User's Manual

For Macintosh and Windows

Alexandria v5.43

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COMPanion® Corporation

1831 Fort Union Boulevard

Salt Lake City, Utah 84121-3041 USA

(801) 943-7277 Voice, worldwide

(800) 347-6439 Voice—Sales, US & Canada

(800) 347-4942 Voice—Tech Support, US & Canada

tech support, worldwide: `support@goalexandria.com`

(801) 943-7752 FAX, worldwide

Sales: `info@goalexandria.com`

Web: `http://www.goalexandria.com`

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Alexandria

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Alexandria

Introduction

Congratulations on selecting **Alexandria**™ for your library information management system. Alexandria is a powerful application that not only helps you manage your library, but also allows your patrons to fully access your libraries resources.

The Alexandria library automation system consists of a main information server called the *Alexandria Data Station* (or Data Station for short) and various *clients* that can communicate with the Data Station.

The Data Station is the central repository for all your Alexandria library system information; it stores all Alexandria data and performs the work required to process information and command requests from Alexandria clients. The first Alexandria program that you run (and enter registration information into) is your Data Station. There is only one Data Station for each Alexandria license.

The Data Station can perform all the functions of the **Alexandria Librarian**™, **Alexandria District Librarian**™ and **Alexandria Researcher**™ clients. You'll know it's the Data Station because when you launch it, a window will appear and notify you. Inside the same folder as the Data Station is the **Data** folder, where all your information (data) is saved.

Alexandria client computers communicate with the main Alexandria Data Station to perform library functions. Multiple clients can access the same Alexandria Data Station. Your Alexandria license determines which clients you can use and how many can be simultaneously connected.

There are a variety of expanded Alexandria client programs that can access the data on your Data Station. Your license allows a fixed number of simultaneous users, no matter which client you are running. Your Data Station does not count as a client except for a "single user" license where no other clients are allowed. Clients are available for both Mac and Windows.

- **Alexandria Librarian** is used by the Librarian to perform all library functions such as Circulation, cataloging and other administrative functions. Since the Alexandria Librarian capabilities are contained in the Data Station, many libraries will choose to use the Data Station to perform these functions. You may use as many Alexandria Librarian clients as your license permits—but you will always have only **one** Data Station.
- **Alexandria Researcher** is used by patrons to access and search the library catalog and, if authorized, to place holds and reservations on items in the collection. **Alexandria Explorer** can be added as an option.
- **Alexandria WEB™** is purchased as an Alexandria option. When activated in your Data Station, it allows searching of your Alexandria collections using a standard World Wide Web browser such as America Online, Netscape Navigator, or Microsoft Internet Explorer.
- **Alexandria District Librarian** provides access to multiple collections across a district using a wide-area network or to a centralized Alexandria database. With this workstation a librarian can manage multiple libraries in a district.
- **Alexandria Explore** provides a young child's interface to your Alexandria collection. The interface uses graphics and icons to help patrons who do not yet read proficiently find what they need in the collection.

Communication Protocols

Alexandria workstations always communicate with the Data Station using TCP/IP communications protocols. Alexandria v5 does not support Macintosh's AppleTalk protocol.

- **TCP/IP** (Transmission Control Protocol/Internet Protocol) is the protocol used for the Internet and is supported as part of the basic operating systems for both Macintosh and Windows.
- **PPP** (Point to Point Protocol) communication protocol provides a TCP/IP connection using a modem and Internet Service Provider (ISP). If you dial up an on-line service to access the Internet, you can use PPP to connect. PPP should be connected before Alexandria is launched.

Note and Warning Alerts

- NOTE -

Look for a box like this for special notes or comments that should be carefully examined by the user.

WARNING!

Look for a box like this for warning messages or important comments that should not be ignored!

Preparing for Alexandria

This chapter provides information about how to prepare for the automation of your library collection.

Automating Your Library Overview

Use the following steps to prepare your library for automation with Alexandria.

Step 1. Develop a secure backup Strategy
Step 2. Determine your strategy for entering item information into Alexandria
Step 3. Determine your strategy for entering patron information into Alexandria
Step 4. Barcode your collection
Step 5. Install Alexandria
Step 6. Set your library preferences
Step 7. Add your Item Information
Step 8. Add your Patron Information
Step 9. Develop a machine-maintenance strategy
Step 10. Develop an Alexandria maintenance strategy
Step 11. Evaluate the security your Data Station and situation require

Archiving Your Data

Alexandria has a built-in archiving utility *(see "Archive Preferences" on page 72)* that can be configured to make complete, regular copies of your valuable Alexandria **Data** and store them in a folder on your hard disk.

The major difference between a backup and an archive is that backups are made on removable media that can be physically stored away from the library. Archiving provides a quick and automatic method of saving your database before you perform large changes to it through importing or utilities.

Backing Up Your Data

Backups are duplicate copies of files on a computer that should be saved to an external source. You should have a backup strategy in place to ensure that you always have a current backup of your Alexandria data files. **Daily backup of your Alexandria data is highly recommended!**

What to Backup

Alexandria data files change every time you use the Alexandria system. For example, every time you update an item record or a patron, check an item in or out, or perform any other transaction in Alexandria, the data files change to reflect your updates.

All Alexandria information is stored in the **Data** folder**.** This makes it easy to backup your data on a regular basis.

Determining a Backup Strategy

A backup strategy is a schedule for performing backups at regular intervals. It is highly recommended that you use the following guidelines in your backup strategy.

- **Backup your Data folder at the end of every day**.
- Make additional backups before and after you make any major changes in your system. For example, after you do an inventory and use Utilities to update your records at year-end, you should backup your data.
- Keep more than one backup copy of data and store older copies off-location. This protects your data in case of fire or theft in the library.
- Test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this *before* you have a problem so you'll know that you can recover data when needed.

Develop a Secure Backup Strategy

For the purpose of backups, there are two kinds of files.

- **Program Files** are the files that make your applications run. These files are sent to you on disks or CDs, or downloaded from the internet, and you install them. In case of a failure in your system, you can reinstall these program files. For this reason, you are allowed to make *one* backup copy of the original disks or CDs to archive before storing both the original and backup copy in a safe place.
- **Data Files** are where your system information is stored. When you enter and change information using your applications such as Alexandria, Microsoft Excel, and ClarisWorks, your data files are updated. Because these files can change every time you use the application, and because losing all the data you have entered can be a major loss, you must make backup copies of your data on a regular basis.

A backup strategy is a schedule for performing backups at regular intervals to minimize data loss in the event your computer system fails.

Why You Must Backup Your Data

Inevitably, sometime during the life of your computer, you will suffer some type of hardware malfunction. When this happens, your data can be irreparably corrupted or lost. Although you can reinstall the Alexandria application from your original CD, doing so does not retrieve your most current data files.

Your only options for recovering data when you have suffered a malfunction are to either re-enter all the data by hand or to recover your most recent data from a backup copy—updating only the data that changed since the last backup was made. The more current the backup copy of the data, the less data you will have to re-enter.

NOTE:

Daily backups of your Alexandria data are highly recommended!

All Alexandria data is stored in the **Data** folder, which makes it easy to backup your data on a regular basis. You should have a backup strategy in place to ensure that you always have a current backup of your Alexandria data files. With adequate backup procedures in place, only small amounts of information will be lost, even after the worst conceivable failure.

Your backup procedure for Alexandria should copy the **Data** folder. Some library systems only backup your transactions on a daily basis. Although this technique results in a fast backup, it's not complete, and recovery can take much longer than a full backup.

If you make a backup copy of the **Data** folder every day, you'll be able to recover all the changes you've made through the end of each day. You can then recover the data easily and rapidly, should it be required.

Backup Hardware

Although you can use any computer mass storage device for backups, the most reliable and cost effective choices are tape (DAT, DLT, etc.) and removable media (Zip, Jaz, CD-R, CD-RW, etc.) media. COMPanion recommends that you **DO NOT** backup on floppy disks or any hard disks connected to your computer. For the best reliability, backup media should be stored away from your computer in case of theft, fire or other physical loss.

If you have a large amount of data, tape backup is the most reliable, cost effective and efficient method. With tape drives, you can set backup procedures to run at a predetermined date and time without operator interaction. More so, modern tape drives hold several gigabytes of data on a single tape cartridge. If you have smaller amounts of data, removable media devices, such as COMPanion's Workstation Backup, provide ease of use and security.

Your choice of backup hardware will depend on your budget, the amount of data you need to backup, and the policies and procedures within your district or library.

Guidelines for Your Backup Strategy

The following are general guidelines to follow regardless of the specific backup strategy you use.

- Before using a new system, perform an initial backup to create a permanent archive of your data.
- Backup your data before and after you make any major changes, such as taking inventory in the library. Use **Utilities** to make general updates such as grade changes and updates to library cards.
- To minimize data loss due to bad backup devices (such as a damaged tape) avoid using the same tape, disk, or CD-RW for consecutive backups.
- Keep more than one backup copy of data and store older copies off-location. This protects your data in case of fire or theft in the library.
- To ensure you are using your backup hardware and software correctly, practice restoring data from a backup device. Don't wait until you have lost data and need your backup to learn how to restore your data or discover a flaw in your backup procedures.

Sample Backup Strategy

The following is a sample strategy for routine backup during normal operations. It requires a minimum of **eight** tapes or cartridges.

Step 1. Label four tapes: Monday, Tuesday, Wednesday, and Thursday.

Step 2. Label four additional tapes: Friday-1, Friday-2, Friday-3, and Friday-4.

Step 3. Backup Monday through Thursday at the end of the day, using the assigned tape. Use the same tape for the same day of each week. For example, use the Monday tape every Monday, copying over last week's Monday backup with this week's Monday backup.

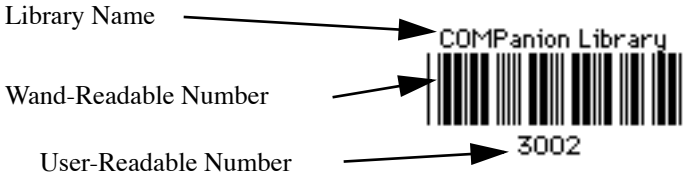
Step 4. Backup Friday at the end of the day *using a new tape every Friday.* Use the tapes labeled Friday-1, Friday-2, and so on. Do *not* copy over the previous Friday's backup.

Step 5. If you have more tapes or cartridges available, use these to keep more than four Friday backup tapes.

Step 6. Store your Friday backup tapes or cartridges in a location other than the library. This guards against loss of data in case of fire or theft.

Barcode Your Collection

Each item and patron in your library is assigned a unique number that Alexandria uses for identification. These numbers appear as barcode numbers on library items and patron library cards.



A typical barcode label consists of three pieces of information:

- The name of the library, school, or company
- The barcode, usually printed in the middle of the label
- The barcode number written in numerals at the bottom of the label

A barcode can be read quickly by powerful, low-cost scanning devices that you can purchase from COMPanion Corporation. Using a barcode reader makes your job easier and reduces the chance for errors. If you don't have a scanner, you can type the User-Readable number in the command line.

The format of the barcode is called its *symbology*. The symbology COMPanion uses, Code 39 (also known as Code 3 of 9), is the industry standard for industrial and commercial applications—including libraries. This symbology provides a high level of data security with error rates between 1 in 3 million and 1 in 70 million characters scanned. Code 39 does not require a check character in normal commercial and industrial applications. It is also bi-directional, which means it can be scanned from left to right or from right to left.

You need barcode labels on all the items in your library that will be managed with Alexandria. You may also want to barcode objects such as audio visual equipment, computers, desks, and tables, so you can use Alexandria to inventory these items.

You can also keep temporary records of items such as magazines and newspapers. Temporary items can be assigned a barcode number and then circulated like permanent items. A barcode number is assigned to a temporary item only while it's checked out.

Guidelines for Choosing Barcode Numbers

You can setup barcode numbers (according to your needs) using up to 14 digits. The following are general guidelines for determining your barcode numbering:

- Use the same number of digits for items and patrons.
- Consider using an employee ID or student number for patron barcodes (be sure employee IDs or student numbers do not coincide with item numbers).
- If you have more than one library in your system, use a unique barcode numbering scheme for each library's collection. This will make it easier to manage a central catalog with holdings from all libraries within the system. If items are moved between collections, the barcodes will remain unique and do not interfere with existing item barcodes.
- Use the simplest numbering scheme possible that still meets your needs.

Sample Barcode Numbering Scheme

The following is a sample barcode numbering scheme. This scheme supports management of up to 899 libraries with each library having up to 300,000 patrons and 700,000 items. You can vary this scheme to handle more libraries, groups within a library, or independent items.

> **- NOTE -**
>
> It is recommended that you avoid starting barcodes with zero ("0") as the first digit. Barcodes can contain letters and numbers; spaces and punctuation are not allowed.

This sample scheme uses a 9-digit barcode number for items and patrons.

- **Digits 1 to 3** identify the library. For example, 100 is Eastside Library, 200 is Westside Library, and so forth.

  You can use the three digits within this group to further breakdown the libraries. For example:

  110 — Eastside Elementary School's library
  130 — Eastside Middle School's library
  150 — Eastside High School's library
  210 — Westside Elementary School's library
  230 — Westside Middle School's library
  ...and so on

  If you have more than one library in your system, using unique barcodes for each library's collection makes it easier to manage a central catalog with holdings from all libraries in the district. If items are moved between collections, the barcodes are unique and do not interfere with barcodes for the existing items.

- **Digit 4** can tie a barcode to a patron group such as students or staff, to a medium type or vendor, or to an item group such as fiction or reference. For example, if you use 0 through 2 for patrons and 3 through 9 for items, you will have unique barcode numbers for 3 patron groups and 7 item groups.

- **Digits 5 through 9** identify the individual patrons or items in the group.

NOTE:

The spaces between numbers in the barcode example to the right are for readability. The actual barcode would be entered as: **110200361.**

Using the above scheme, you would have barcodes like the following. The bold digits identify the library, the underlined digit identifies the patron or item group, and the remaining digits identify the particular patron or item.

110 2 00361 110 identifies the library

2 identifies the patron or item group

00361 is the specific patron or item's number

If you have a smaller number of patrons, you can choose a simpler code with fewer digits. The main objective is to keep the number of digits the same for items and patrons to ensure that each library in a district has a unique range of barcode numbers, and to use the most straightforward numbering scheme that meets your needs.

Classes of Barcode Labels

There are two classes of barcode label.

- **Photocomposed labels** are made using a photographic process to create high-quality, long-lasting labels. Rather than printing ink on paper, the photocomposed process makes the barcode image an integral part of the label. These labels usually come with high-quality lamination and adhesives that make them durable and easy to attach. You should use photocomposed labels on all permanent items.

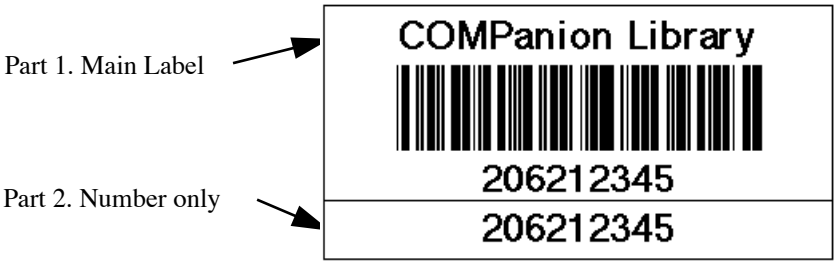
- **Printed labels** are made using a printing process that places the ink on top of the label. These labels require protection of some kind to keep the ink from rubbing off. An extra protection label of transparent Mylar can be placed on these to extend their lives. Although the cost of these labels is less than photocomposed labels, the protection and labor they require can cause them, in most cases, to cost more. Printed labels without extra protection are most cost-effective when printed by you in your library and used for temporary items such as magazines and newspapers.

One and Two-Part Labels

You can purchase either one or two-part barcode labels, depending on how you plan to use them. One-part labels include the library name, barcode, and written number.

If you want to place a barcode label in two different locations on an item, you can order two copies of these one-part labels.

Two-part labels include the same information as the one-part label. The two-part labels also include a second portion on the label, which display the written barcode number.



The second part of the label is useful to attach to a shelf list card or placed in the book in a different location than the upper portion.

Two-part labels provide the benefits of having two labels for each item, at a lower overall cost.

Where to Place Barcode Labels

You can place barcode labels on the inside or outside of items. A label on the outside is easy to locate, but is subject to much greater wear and tear, therefore shortening its life.

Most Alexandria users place their labels on the inside back cover of books and on the outside of items such as records, tapes and CDs.

If you plan to place barcode labels under a clear jacket cover, test your barcode reader to make sure it can read the labels through the jacket cover.

Placing barcodes vertically on the back cover next to the spine can make inventory easier since you wouldn't need to fully remove the books from the shelf to scan them with a barcode reader.

When to Label Items

You can label items either before or after you enter item information.

For an existing library, it's usually easier to purchase your barcode labels early and place them on the items before the item information is entered into the computer. Use two-part labels for this method. As you place the barcode on the item, place the second label on the shelf list card that will be used for entering item data into the computer.

If you are starting a new library, be sure to purchase bibliographic information for your items in a computer-readable format (Marc or MicroLIF). Either order your books with barcode labels attached, or tell your supplier which numbers to assign (in the Marc/MicroLIF records). Have the numbers assigned in call number order so it's easy for you to locate the item for each barcode label you have to apply.

Barcode Readers

To read a barcode, your computer needs a special device designed to read the barcode and enter the value into the computer. This device is called a *barcode reader* or *scanner*.

There are a number of different types of barcode readers available, including light pen readers, laser readers and portable readers. The device you choose for your library depends on your budget and your library's requirements.

Wand or pen-type readers are the least expensive devices for reading barcodes. CCD Wedge or laser scanners are more expensive but do a better job reading the labels, especially in those hard-to-reach item places.

Portable readers give you the freedom of going to your bookshelves to scan labels, rather than having to take the books to the Librarian Workstation to be scanned. Portable readers are especially useful during inventory.

Enter Item Data

The process of taking existing catalog information (usually on card catalogs) and converting the information into a machine-readable format is called *retrospective conversion*. This process takes time and effort. It is usually a good time to examine your collection and remove unused and outdated items.

There are several methods of converting your data for Alexandria.

- **Retrospective Conversion—**You can hire a retrospective conversion company to create MicroLIF and Marc records for all items in your collection.

  Before sending your shelf list to the conversion company, assign barcode numbers to the items in your collection and record the barcode and other local information on the catalog cards. The Marc records you receive and import into Alexandria will be complete, and you will have no additional data to enter.

  This process can be time-consuming and expensive, but it is the most complete retrospective conversion method available.

- **Create your own Marc records using a Marc record database**—COMPanion offers **SmartMARC**™, which includes (and reads) **Brodart's Precision One** CD-ROM database of Marc records; or various Z39.50 libraries accessible with an Internet connection. You input minimal information (i.e. title, author, ISBN and/or LCCN) and then SmartMARC searches for Marc records matching the brief information you enter.

  Once the process is complete, you can add local information such as call number (tag **852_h**), barcode number (tag **852_p**), price (tag **852_q**), item type (tag **949_a**), special funds (tag **852_i**), and volume (tag **949_d**) to your Marc records.

  This process can save many hours in your retrospective conversion. If you plan to do your own retrospective conversion, this is the best alternative.

- **Import item records into Alexandria from another source**—You can enter information using any database program that can create a TEXT file in a tab-delimited format.

- **Enter the information directly into Alexandria**—This direct approach is more time-consuming, but is also cost-effective.

Many book Vendors offer Marc/MicroLIF records on disks or CD-ROMs for the items they sell. Conveniently, Alexandria can read Marc or MicroLIF records directly, saving you the time and energy of typing item information directly into the computer. If you are automating a new library, ask for these records when you order items.

Enter Patron Data

In the same way that you must enter item information into Alexandria, you must also enter information about the patrons who use your library. Patron information can be entered one patron at a time from the **Patrons** window or imported from another source.

Imported patron data can come from any source that provides a *tab-delimited* file format. In many cases, patron data is available in machine-readable format in your school's office or at the district office. Check with your school or district office to find out how patron data is stored.

Set Your Library Preferences

All libraries have rules that govern how patrons use the library, how items are managed and how the library operates. The Alexandria system uses preferences to establish and apply these rules.

School libraries, for example, can set preferences that allow tenth grade students to check items out for a longer period of time than second grade students. The check out period for reference items can be set for one day, while fiction and nonfiction works can be set for two weeks.

Alexandria collects statistics on each group of patrons, such as the types of the items they check out and when they check the items out. These statistics are generally used to determine usage patterns for the library to help schedule staff and make management decisions.

For each group of patrons and items for which you collect usage statistics, you should assign a separate policy. For example, if each grade level of students has its own policy, the statistics generated are more useful than if you have only one policy for all students.

See the related preference chapters for information about how to apply and set rules for your library.

Develop a Machine Maintenance Strategy

Although computers today are very useful tools, they can experience damage through excessive use, power fluctuations, crashes, and incorrect operations. To discover and postpone such damage, you should run maintenance utilities such as **Scandisk** or **Disk Defragment** on Windows and **Norton Disk Doctor** on Macintosh. Alexandria should *not* be running during these maintenance operations.

In addition, you should regularly perform a virus scan with products such as **Norton Anti-Virus** or **McAfee Virus-Scan**. Again, Alexandria should *not* be running when performing such virus scans.

Develop an Alexandria Maintenance Strategy

Corruption can occur for any database of information via hardware or operating system mishap. It is recommended that you use Alexandria's Rebuild utility on a regular basis (once a month is usually sufficient). However, hardware or system failure may neccesitate using the utility more often. The Rebuild utility disables all services while it is cleaning your data and can take several hours depending on the size of your data and speed of your machine. You should backup or archive prior to running Rebuild, just as you should with any other utilities.

Evaluate the Security of Your Data Station

Some libraries may not have the funds or hardware necessary to have a dedicated Data Station. If your Data Station is accessible to the general public, you may want to enable additional security that would prevent unauthorized users from deleting, renaming, or moving your Alexandria application or **Data** folder. Some file security may be built into your operating system; some operating systems have no such security and would require purchasing third party software to provide that file security.

If you don't have file security on your Data Station, you should be extra vigilant in backing-up your **Data** folder.

Installing Alexandria

This chapter describes how to install the Alexandria Data Station and other standard Alexandria clients. The instructions in this chapter assume you have a working knowledge of your computer operating system.

Before you install Alexandria, make sure you have the registration letter that came with your program. This letter contains information required during the installation process.

Hardware and Operating System Requirements

Alexandria can operate with MacOS and Windows based systems. With the exception of minor differences between the controls at the top of windows and minor differences in the operating systems, the program operates identically across both platforms.

The following are the hardware and operating system requirements for Alexandria:

Table 1: Hardware & System Requirements

Alexandria (Data Station)	G3 PowerPC with MacOS 8.6 or later. or Pentium II processor with Windows 98 or later.
Alexandria District Librarian	64MB RAM suggested, 32MB minimum.
Alexandria WEB	1A fixed TCP/IP address is required (single user systems do not require networking). Alexandria WEB requires a Web browser for access and TCP/IP active on the Data Station. Use the Data Station's TCP/IP address in your web browser to search your collection.
Alexandria Librarian	PowerPC with MacOS 8.6 or later. or Pentium II processor with Windows 98 or later. 32MB RAM
Alexandria Researcher	PowerPC with MacOS 8.1 or later. or Pentium II processor with Windows 95 or later. 32 MB RAM.
Alexandria 68K Researcher	68040 Processor with MacOS 7.55 or later. 16MB RAM

NOTE:
68K Researcher will not auto update with new releases. This client is provided on an "as-is" basis.

Alexandria Communication Systems

Alexandria uses TCP/IP to communicate between the Data Station and its clients.

WARNING!
If you use TCP/IP, the Alexandria Data Station must have a fixed address. The address for the Alexandria Data Station cannot be dynamically allocated and must be static.

If you have questions during installation, contact COMPanion's Technical Support Services at (800) 347-4942 or (801) 943-7277, by Fax at (801) 943-7752, by Toll-Free Fax at (888) 515-3883, or by Email via "`support@companioncorp.com`"

If you have a full time Internet connection, you can send Email directly to COMPanion from Alexandria if you have a personalized return Email address *(see "Email tab" on page 85)*. To Email Technical Support, choose **Tech Support** under the **Apple Menu** on Macintosh, or under the **Help** menu on Windows.

Installation Summary *(read this first)*

If it doesn't already exist, the installer creates an **Alexandria v5 Folder** and installs the Alexandria program inside this folder. This is where all your valuable library data will be saved. Once installed, the Alexandria program (also called the Data Station) will then create all the other client installers.

The Data Station is where all data is saved. The Data Station can also perform all the functions of the **Alexandria Librarian** and **Alexandria Researcher** clients.

If you have a single user license, you'll only be using the Data Station and no further clients will be created.

If you have only a few computers, you may want your main Circulation machine to also be your Data Station. In this case, you wouldn't typically install another **Alexandria Librarian**. Your Data Station will be used by the Librarian for Circulation and reporting.

In a middle-sized configuration, you may have a machine in the "back room" for infrequent librarian use only. Install the Data Station on this machine and use other machines for **Alexandria Librarian** and **Alexandria Researcher**.

If you are planning to have a large number of clients, you'll want to install your Data Station on a dedicated machine, i.e. the machine will only be running the Data Station and will not typically be used by an operator. In this configuration, you'll be running **Alexandria Librarian** and **Alexandria Researcher** on other machines.

The following are the general steps required to install Alexandria. More detailed instructions are included in the remaining sections of this chapter.

Step 1. On the machine you are going to use for your Data Station, insert the Alexandria CD-ROM and double-click on the **Alexandria v5** folder. The **Alexandria v5 Installer** is located inside this folder. You can also visit COMPanion's Web site (`www.goalexandria.com`) and download the latest **Alexandria v5 Installer**.

Step 2. Once Alexandria is installed, double-click on the **Alexandria** program icon. Enter your registration information. Once registered, Alexandria will create a folder called **Installers** in the same folder as the Alexandria program. Inside this folder are the installers for the clients you've licensed. If your system doesn't have the necessary resources to create the installers, Alexandria will attempt to download them from COMPanion's update server. In this case, installers may not be created until the next time you launch Alexandria.

Step 3. Use the client installers inside the **Installers** folder to install your clients on other machines. Clients can be cross platform if purchased as such.

Step 4. If you've licensed **Kid's Catalog**, install it according to its separate installation instructions.

Step 5. If you've licensed **Alexandria WEB**, your activation code turns it on—all you need to do is set **Alexandria WEB Preferences**.

Step 6. If you've licensed **Alexandria WAN** capabilities, your activation code turns it on—all you need to do is set **Address Books** in **Administration Preferences**.

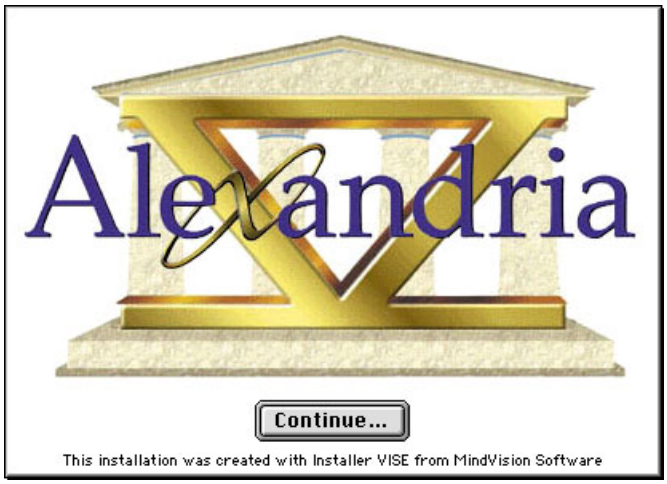
Step 7. If you've licensed **Z39.50 Server**, **Alexandria Explore**, or **Z39.50 Clients**, your activation code turns them on—all you need to do is set their preferences.

Installing a Macintosh Alexandria Data Station

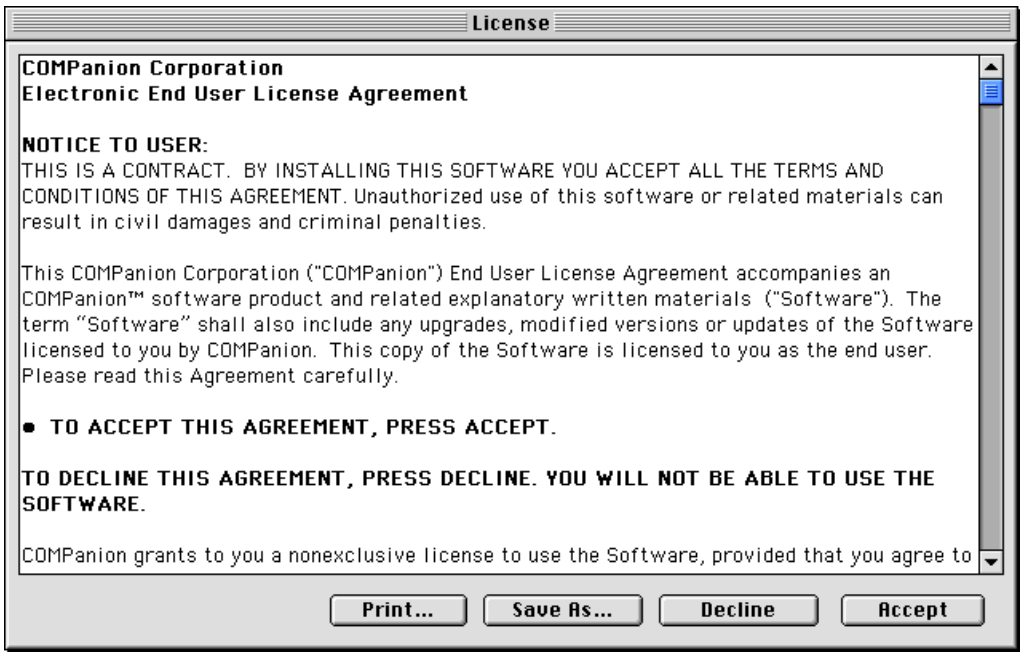
Use the following instructions to install **Alexandria** or **Alexandria District Librarian** on the Macintosh. If you are installing the **Alexandria District Librarian**, follow these directions using the **District Librarian Installer** instead.

Step 1. On the machine you are going to use for your Data Station, insert the COMPanion CD and double-click on the **Alexandria v5** folder. The Alexandria installer is located inside this folder. You can also visit COMPanion's Web Site (`www.goalexandria.com`) and download the latest Alexandria Installer.

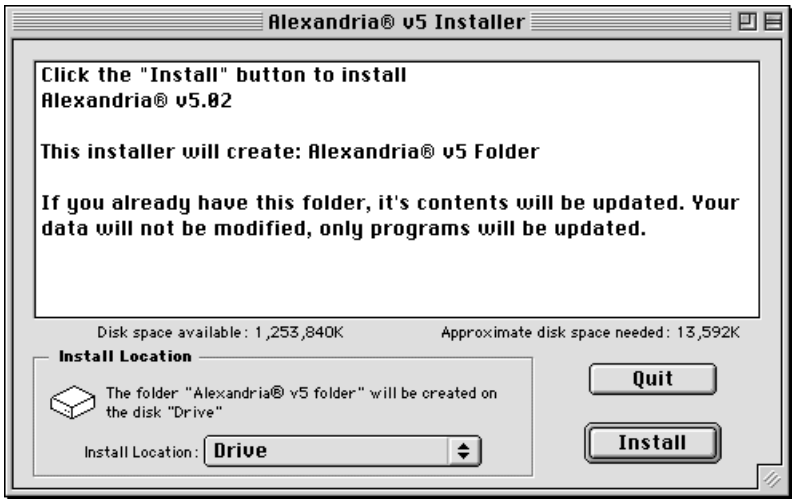
Step 2. Double-click the **Alexandria v5 Installer** icon. When the Alexandria Installer splash screen appears, click on **Continue**.



Step 3. Next, The COMPanion Electronic End User License Agreement appears. Read the license carefully and click the **Accept** button if you accept the terms of the license. If you do not accept the terms of the license, click on the **Decline** button.


License
COMPanion Corporation
Electronic End User License Agreement
NOTICE TO USER:
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT. Unauthorized use of this software or related materials can result in civil damages and criminal penalties.
This COMPanion Corporation ("COMPanion") End User License Agreement accompanies an COMPanion™ software product and related explanatory written materials ("Software"). The term "Software" shall also include any upgrades, modified versions or updates of the Software licensed to you by COMPanion. This copy of the Software is licensed to you as the end user. Please read this Agreement carefully.
• TO ACCEPT THIS AGREEMENT, PRESS ACCEPT.
TO DECLINE THIS AGREEMENT, PRESS DECLINE. YOU WILL NOT BE ABLE TO USE THE SOFTWARE.
COMPanion grants to you a nonexclusive license to use the Software, provided that you agree to
Print...
Save As...
Decline
Accept

Step 4. When the following window appears, verify that the **Install Location** specifies where you want Alexandria installed. The default is the hard drive where the currently active System Folder is located. This is usually the best location to install the program. Click **Install**.


Alexandria® v5 Installer
Click the "Install" button to install
Alexandria® v5.02
This installer will create: Alexandria® v5 Folder
If you already have this folder, it's contents will be updated. Your data will not be modified, only programs will be updated.
Disk space available: 1,253,840K
Approximate disk space needed: 13,592K
Install Location
The folder "Alexandria® v5 folder" will be created on the disk "Drive"
Install Location: Drive
Quit
Install

Step 5. During installation, a window similar to the following displays the installer's progress. To stop installation, click the **Stop** button.

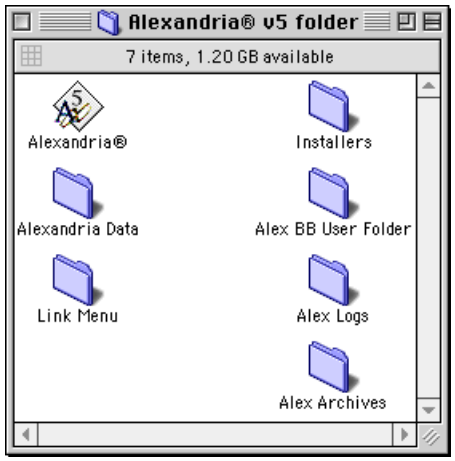
Installing
Items remaining to be installed: 6
Installing: Alexandria®
Stop
This installation was created with Installer VISE from MindVision Software

Step 6. When the installation is complete, a confirmation window appears. Click **Quit**.

Installation was successful. If you are finished, click Quit to leave the Installer. If you wish to perform additional installations, click Continue.
Continue
Quit

Step 7. Eject the CD by dragging its icon to the TrashCan icon. Store the CD-ROM in a safe place for future use.

Step 8. An **Alexandria v5 folder** is now installed. The following is a sample of the window that appears when you install the Data Station.



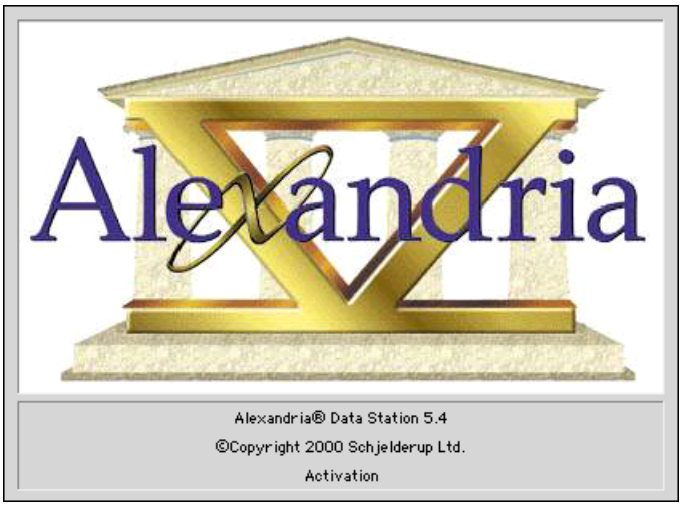
Step 9. Note: The user documentation is included on the Alexandria CD-ROM (in ".pdf" format) but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there. If the documentation is copied to the **Link Menu** folder, you can access it from within Alexandria.

If you don't have Adobe's Acrobat Reader installed on your machine, an installer is included in the **Utilities** folder of the COMPanion CD or from Adobe's web site:
"`http://www.adobe.com/products/acrobat/readstep.html`"

Step 10. Double-click the **Alexandria** icon to start the program.

W A R N I N G !
If you have PPP installed, but not running, the Alexandria Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

Step 11. When you start Alexandria, the following Startup window appears. If you have not yet registered Alexandria, a registration window appears (described in Step 12). Otherwise, the **Circulation** window appears.



Step 12. The first time you start the Data Station, the following registration window appears. Enter your Library Name, Product Codes, Serial Number and Validation Code from your registration letter and click **OK**.

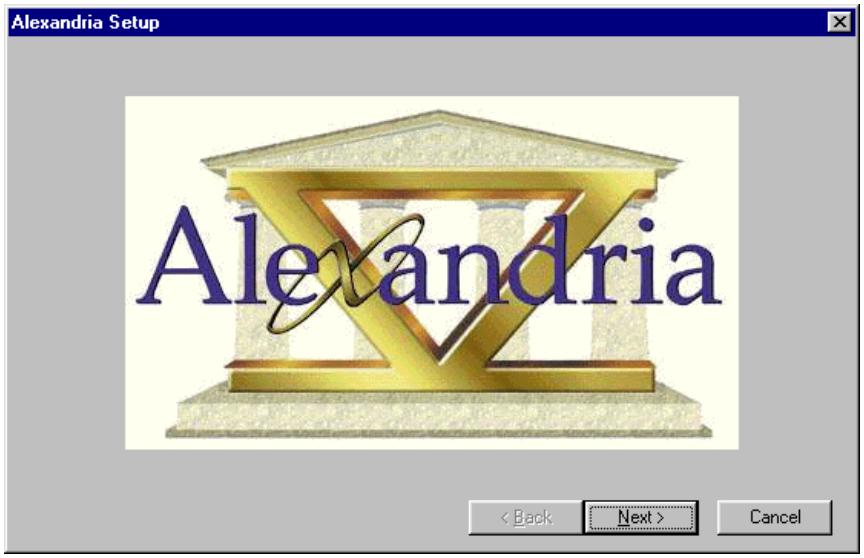
Step 13. That's it. You've installed your Alexandria Data Station. If you've purchased a single user license, you're finished installing. If you've licensed additional clients, skip to "Installing Alexandria Clients" on page 27.

Installing a Windows Alexandria Data Station

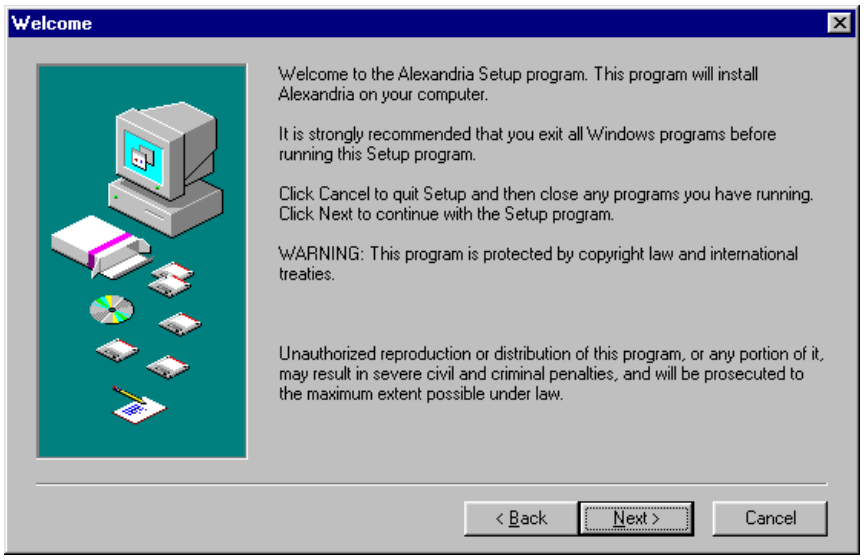
Use the following instructions to install Alexandria or Alexandria District Librarian on Windows. If you are installing the Alexandria District Librarian, follow these directions using the **District Librarian Installer.exe** instead.

Step 1. On the machine you are going to use for your Data Station, insert the COMPanion CD-ROM, locate it using the **My Computer** icon on your desktop. Double-click the CD icon and then double-click on the **Alexandria v5** folder. The Alexandria installer (**Alexandria v5 Installer.exe**) is located inside this folder. Or go to COMPanion's Web site (`www.companioncorp.com`) and download the latest Alexandria Installer.

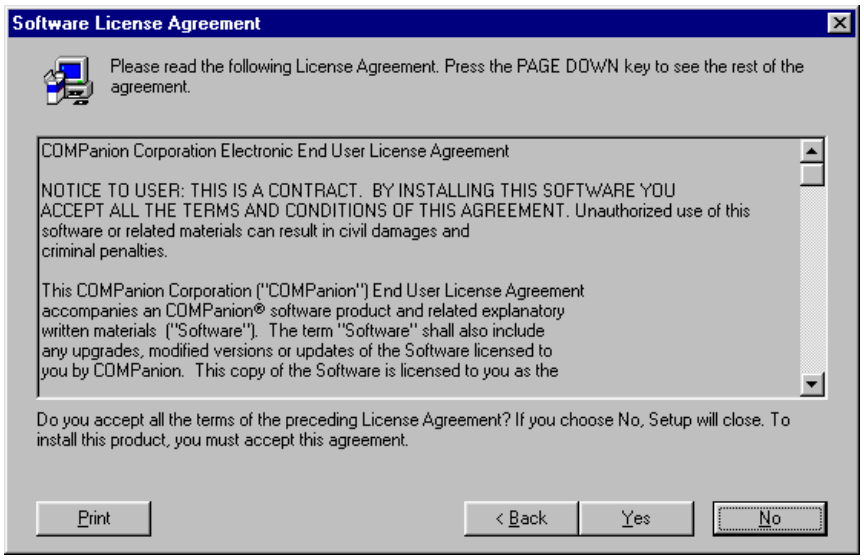
Step 2. Double-click the **Alexandria v5 Installer.exe** icon. When the Alexandria Installer splash screen appears, click **Next** to continue.



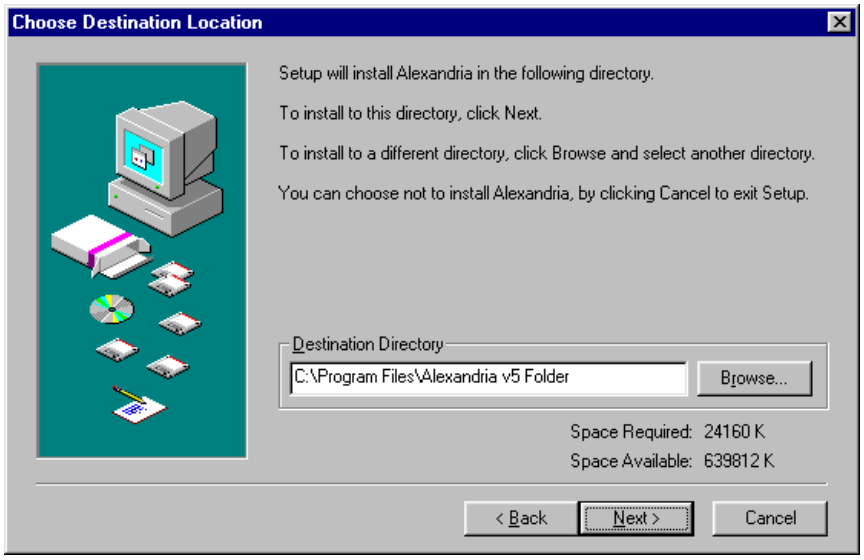
Step 3. The "Welcome" window. Click **Next** to continue.


Welcome
Welcome to the Alexandria Setup program. This program will install Alexandria on your computer.
It is strongly recommended that you exit all Windows programs before running this Setup program.
Click Cancel to quit Setup and then close any programs you have running. Click Next to continue with the Setup program.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
< Back
Next >
Cancel

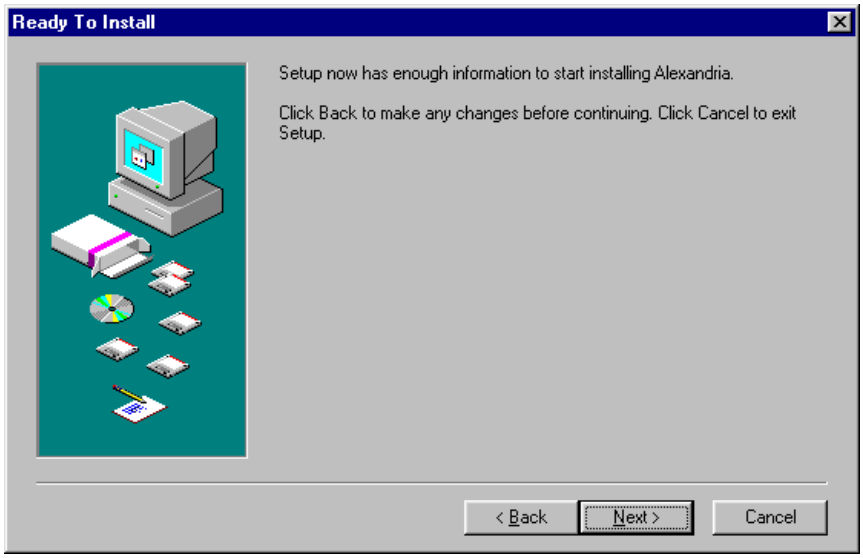
Step 4. The COMPanion Electronic End User License Agreement appears. Read the license carefully and click the **Yes** button if you accept the terms of the license. If you do not accept the terms of the license, then click the **No** button.


Software License Agreement
Please read the following License Agreement. Press the PAGE DOWN key to see the rest of the agreement.
COMPanion Corporation Electronic End User License Agreement
NOTICE TO USER: THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT. Unauthorized use of this software or related materials can result in civil damages and criminal penalties.
This COMPanion Corporation ("COMPanion") End User License Agreement accompanies an COMPanion® software product and related explanatory written materials ("Software"). The term "Software" shall also include any upgrades, modified versions or updates of the Software licensed to you by COMPanion. This copy of the Software is licensed to you as the
Do you accept all the terms of the preceding License Agreement? If you choose No, Setup will close. To install this product, you must accept this agreement.
Print
< Back
Yes
No

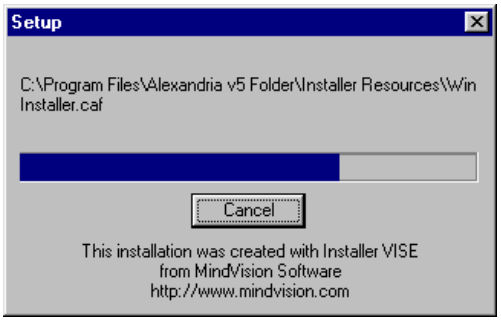
Step 5. Verify that the **Destination Directory** specifies the location where you want Alexandria installed. The default is the **Program Files** directory. This is typically the best location to install the program. Click **Next**.


Choose Destination Location
Setup will install Alexandria in the following directory.
To install to this directory, click Next.
To install to a different directory, click Browse and select another directory.
You can choose not to install Alexandria, by clicking Cancel to exit Setup.
Destination Directory
C:\Program Files\Alexandria v5 Folder
Browse...
Space Required: 24160 K
Space Available: 639812 K
< Back
Next >
Cancel

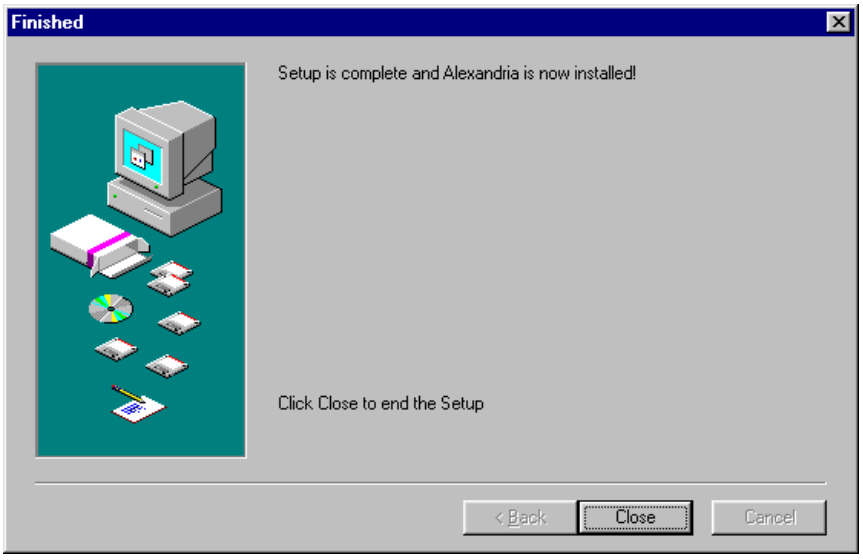
Step 6. Now the "Ready to Install" window. Click **Next** to continue.


Ready To Install
Setup now has enough information to start installing Alexandria.
Click Back to make any changes before continuing. Click Cancel to exit Setup.
< Back
Next >
Cancel

Step 7. During installation, a window similar to the following shows the installer's progress. To cancel installation, click the **Cancel** button.

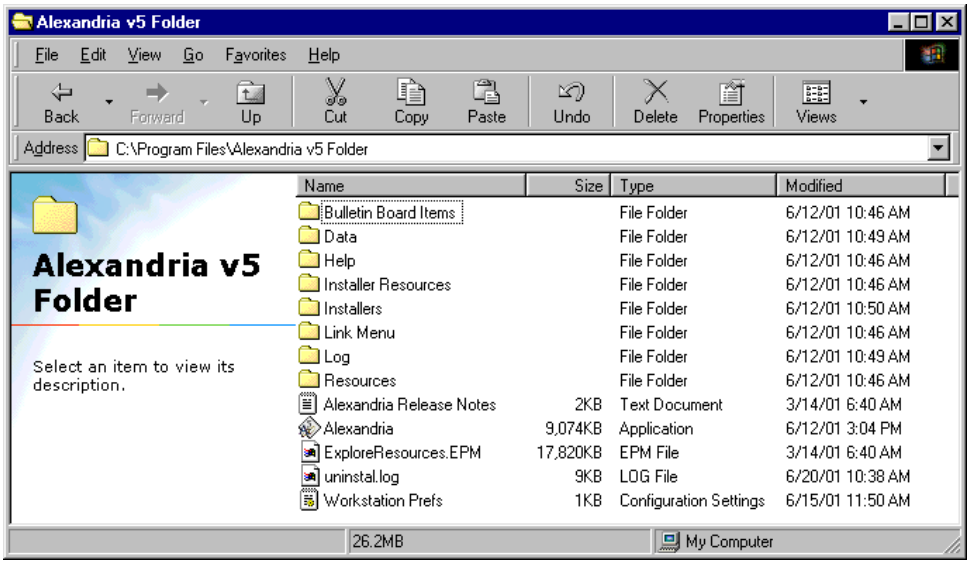


Step 8. When the installation is complete, a confirmation window appears. Click **Close**.



Step 9. Eject the CD-ROM and store it in a safe place for future use.

Step 10. An **Alexandria v5 folder** is now installed. The following is a sample of the window that appears when you install a site license.


Alexandria v5 Folder
File Edit View Go Favorites Help
Back Forward Up Cut Copy Paste Undo Delete Properties Views
Address C:\Program Files\Alexandria v5 Folder
Alexandria v5 Folder
Select an item to view its description.
Name Size Type Modified
Bulletin Board Items File Folder 6/12/01 10:46 AM
Data File Folder 6/12/01 10:49 AM
Help File Folder 6/12/01 10:46 AM
Installer Resources File Folder 6/12/01 10:46 AM
Installers File Folder 6/12/01 10:50 AM
Link Menu File Folder 6/12/01 10:46 AM
Log File Folder 6/12/01 10:49 AM
Resources File Folder 6/12/01 10:46 AM
Alexandria Release Notes 2KB Text Document 3/14/01 6:40 AM
Alexandria 9,074KB Application 6/12/01 3:04 PM
ExploreResources.EPM 17,820KB EPM File 3/14/01 6:40 AM
uninstal.log 9KB LOG File 6/20/01 10:38 AM
Workstation Prefs 1KB Configuration Settings 6/15/01 11:50 AM
26.2MB
My Computer

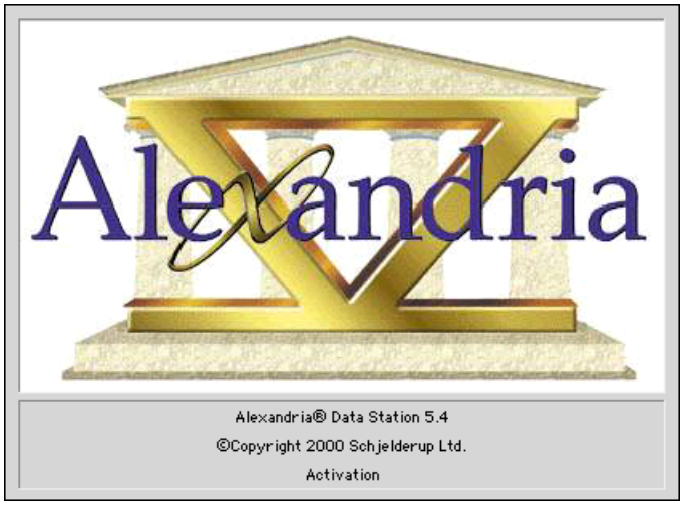
Step 11. Note: This user documentation is also included on the Alexandria CD-ROM but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there. If the documentation is copied to the **Link Menu** folder, you can access it from within Alexandria.

If you don't have Adobe's Acrobat Reader installed on your machine, an installer is included in the **Utilities** folder of the COMPanion CD or from Adobe's web site:
"`http://www.adobe.com/products/acrobat/readstep.html`"

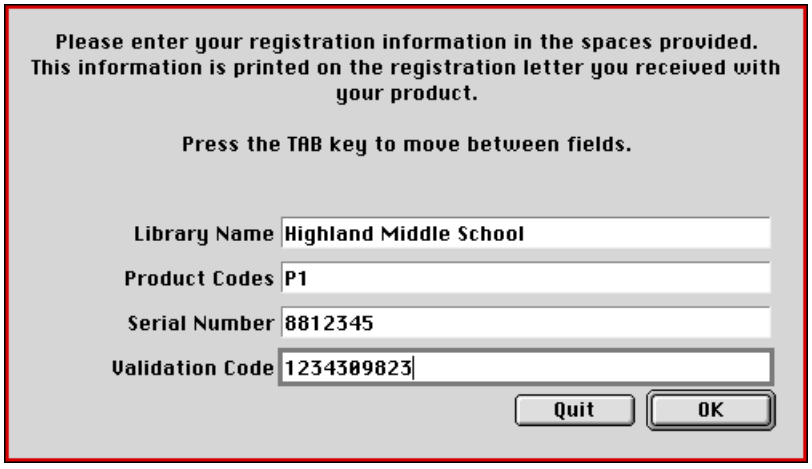
Step 12. Double-click the **Alexandria** icon to start the program.

W A R N I N G !
If you have PPP installed, but not running, the Alexandria Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

Step 13. When you start Alexandria, the following Startup window appears. If you have not yet registered Alexandria, a registration window appears (described in Step 14). Otherwise, the **Circulation** window appears.



Step 14. The first time you start the Data Station, the following registration window appears. Enter your Library Name, Product Codes, Serial Number and Validation Code from your registration letter and click **OK**.



Step 15. That's it! You've installed your Alexandria Data Station. If you've purchased a single user license, you're finished installing. If you've licensed additional clients, continue to the next section.

Installing Alexandria Clients

If you have a license that supports multiple users, you can install clients on other computers.

> **- NOTE -**
>
> **Alexandria** Data Station must be running in order to install clients. If you are installing an Alexandria Librarian on a different OS than your Data Station, you will have to call COMPanion for special instructions on how to install your cross platform Librarian client.
>
> Both Macintosh and Windows Researcher client installers are created automatically by the Data Station if you've purchased cross platform licenses.

Step 1. If they don't already exist, when you launch the Data Station, an **Installers** and an **Installer Resources** folder are created in the **Alexandria v5 Folder.** If your system doesn't have the necessary resources to create these installers and licensed clients, Alexandria will attempt to download them from COMPanion's update server. In this case, installers may not be created until the next time you launch Alexandria. The resources necessary to create the installers, and for the installers to create your clients, are stored in the **Installer Resources** folder which is *(further documented on page 27)*.

Step 2. Double-click the **Installers** folder to display the installers you've licensed. In most cases you'll see **Librarian Installer** and **Researcher installer** folders.[1]

> **NOTE:**
>
> In order for the installer to work, the Data Station must be running.

Step 3. Copy each **Librarian Installer** or **Researcher Installer** folder onto a floppy disk or onto a file server. Then copy the installer folder onto the desktop of any machine on which you want to install the client.

Step 4. Double-click on the installer program icon inside one of the installer folders. The COMPanion Electronic End User License Agreement is displayed. Read the license carefully and click the **Accept** button if you accept the terms of the license. If you do not accept the terms of the license, click the **Decline** button.

Step 5. During installation a status dialog is displayed; you may press the **Cancel** button to stop installation.

Step 6. When installation is complete, an **Alexandria Researcher folder** or **Alexandria Librarian folder** is opened on your desktop. The client is now installed.

Step 7. Double-click on the **Alexandria Librarian** or **Alexandria Researcher** icon to start the client program.

Client Installer Resources

If you have a permanent Internet connection, Alexandria will automatically verify that you have the necessary Client Installer Resources and if any are missing, they will be automatically downloaded from our COMPanion server or created by the Data Station. However, if this process fails, you'll have to manually place these resources into your

1. Inside the folder is an Installer program and an ".acf" configuration file. The ".acf" file tells the Installer program the location of your Data Station and which client to install. The ".acf" configuration file AND Installer program are required to install an Alexandria client.

Alexandria Folder following the rules specified below. Copies of these files can be found on COMPanion CDs or the COMPanion Web site (`www.goalexandria.com`).

These resources should be located inside the **Installer Resources** folder inside your Alexandria folder.

Mac Installer.caf—Contains the resources necessary to create a Macintosh Installer for Macintosh Data Stations. A Macintosh installer can only be created by Macintosh Data Stations. When this installer is used with an ".acf" file, Alexandria will install the proper client.

If you need Macintosh installers for Windows Data Stations, you'll need to copy the **Macintosh Installer** program (found on your COMPanion CD or downloaded from the COMPanion Web site) and the appropriate ".acf" files from your Windows Data Station **Installers** folder onto your Macintosh systems in order to install Macintosh based clients.

Win Installer.caf—Contains the resources necessary to create a Windows Installer. Windows installers can be created by both Windows and Macintosh based Data Stations. When this installer is used with an ".acf" file, Alexandria will install the proper client.

Mac Researcher.caf—Contains the resources necessary for client installers to create a Macintosh Researcher Client. If you don't have this file, you will not be able to install or update Macintosh based Researchers.

Win Researcher.caf—Contains the resources necessary for client installers to create a Windows Researcher Client. If you don't have this file, you will not be able to install or update Windows based Researchers.

Mac Librarian.caf—Contains the resources necessary for client installers to create a Macintosh Librarian Client. If you don't have this file, you will not be able to install or update Macintosh based Librarian Clients.

Win Librarian.caf—Contains the resources necessary for client installers to create a Windows Librarian Client. If you don't have this file, you will not be able to install or update Windows based Librarian Clients.

Using 68K based Macintosh Computers

If you are using 68040 based computers running System 8.1 or later you can still install an Alexandria Researcher as long as these machines have at least 16MB or more of RAM.

> **- NOTE -**
>
> 68K researchers will NOT automatically update as other clients will. No future enhancements are scheduled for the 68k client. However, 68k machines can still use Alexandria WEB via a browser to get any new capabilities added in Alexandria WEB.

Copy the **Alexandria Researcher 68k** program and **Mac Researcher.acf** files onto the 68k Macintosh. Put the **Mac Researcher.acf** file into the folder containing the **Alexandria Researcher 68k** program icon. When the researcher program launches, it will configure the 68k Researcher for your Data Station and delete the ".acf" file.

Configuring Alexandria WEB

Alexandria WEB is an optional feature of Alexandria. This feature is activated by information you enter on the Registration window during installation.

Step 1. Under the **Edit** menu select **Preferences**.

Step 2. In the **Preferences** window select **Web** in the field.

Step 3. Use the Web preference window to set preferences for Web access users *(see "Alexandria WEB" on page 223)*.

Step 4. To use Alexandria WEB, launch your web browser (for example, Netscape Navigator or Microsoft Internet Explorer).

Step 5. In the URL field on your browser window, enter the TCP/IP address of your Data Station (the TCP address is displayed in the transaction log when you first launch the Data Station) or DNS name assigned to that TCP/IP address by your system administrator. The URL field is usually at the top of the browser window. On the Netscape Navigator screen, the field is labeled either **Location** or **Go To**.

Step 6. If you changed the port value when setting the web preferences, type a colon followed by the port number at the end of your *WWW* address. For example, if the location of your Data Station is (`www.alexweb.com`) and you changed the port value to 81, type "`www.alexweb.com:81/`" in the **Go To** field without the quotation marks.

- NOTE -

If you are not familiar with browsers, domain names, IP addresses and other information referenced above, see your system administrator or other qualified individuals in your organization to help you get setup.

Installing NetLink III

NetLink III is a set of catalog websites available in Marc format[1]. If you've purchased this option, Alexandria will perform the following additional functions.

You MUST have an internet connection to install or update your NetLink III records. To do this, select **Utilities** under the **File** menu. Under the **Utility Type** pull-down menu, select **Check For Updates** and then under **Operation** pull-down menu, select **Get Updates**. To install or upgrade your NetLink III records, click on the **Run** button to finish installation.

Updated records are available once a month. You can choose to update your database at any time it's convenient for you.

Please note that if your NetLink III Subscription is not current, you will not be able to upgrade your records, but will be able to continue using your existing records.

Additional utilities are enabled to allow you to remove all NetLink III records if you no longer want to use them.

Additional NetLink III reports are available so you can view the saved data.

You will NOT be able to export NetLink III records, Alexandria will always filter them out during any export operation.

If you've purchased the NetLink III option, you'll need to import the NetLink III records into your Alexandria Data Station[2]. Drag and drop these files onto your Circulation window. Alexandria will recognize them as NetLink III records and automatically import them. There is no need to adjust any of the import preferences. NetLink III records are imported without copy information and are displayed in results lists as "`WEB`" rather than "`IN`" or "`OUT`."

NetLink III records are licensed for use on one Data Station at a time. If you have two copies of Alexandria, you need to purchase two NetLink III licenses.

Installing Z39.50 Server

If you've purchased the Z39.50 Server option, your Alexandria Data Station will accept Z39.50 queries from standard Z39.50 clients. Use the TCP/IP address of your Data Station for the Z39.50 Server Address. The Z39.50 server will use Port 210.

There are no Z39.50 Preferences or other settings you need to configure.

---

1. You can confirm you have this option if you see a `"G4"` in the activation code.
2. If you have not been licensed for NetLink III, NetLink III records will not import into your Alexandria System.

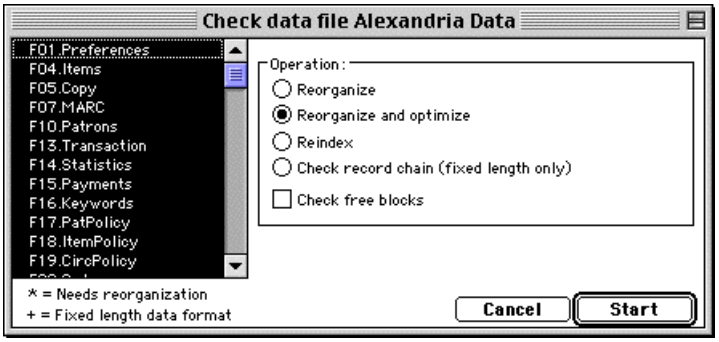
Transferring data from Alexandria v3

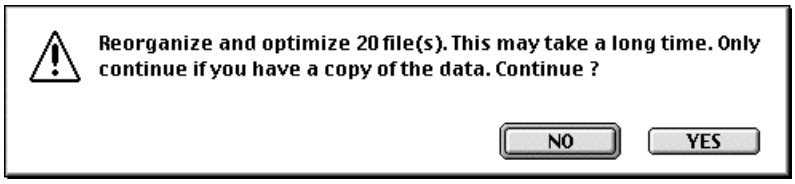
If you are upgrading from Alexandria v3, follow these simple instructions to transfer all your data into Alexandria v5.[1]

Step 1. Backup your Alexandria v3 Data.

Step 2. Start Alexandria v3 in Single User mode by holding down the <shift> key when Alexandria is launching. Confirm you are using Alexandria version 3.89 or later for the best conversion results. If not, update to the latest version of Alexandria v3 before converting data.

Step 3. Just to be sure your Alexandria v3 data is in perfect condition, following the instructions in your User's Manual, perform the Reorganize and Optimize procedure on all files.

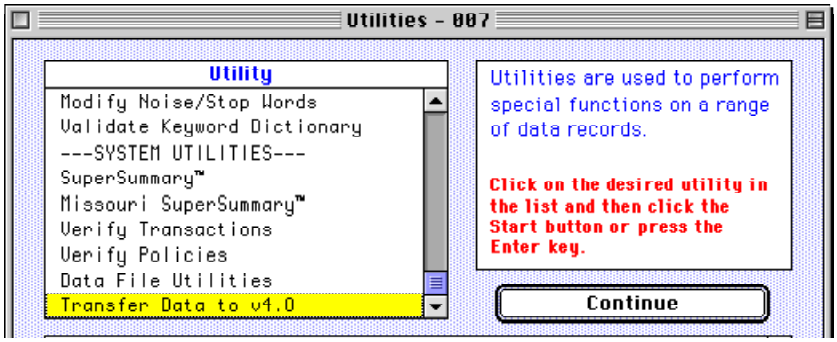




The confirmation dialog should indicate you are optimizing 20 files. If you didn't select all the files, click **NO** and try again.

Step 4. Once you've reorganized your data, run the **Verify Patron Status**, **Verify Item Status** and **Verify Transactions** utilities.

Step 5. Select **Utilities** from the **File** menu.


Utilities - 807
Utility
Modify Noise/Stop Words
Validate Keyword Dictionary
---SYSTEM UTILITIES---
SuperSummary™
Missouri SuperSummary™
Verify Transactions
Verify Policies
Data File Utilities
Transfer Data to v4.0
Utilities are used to perform special functions on a range of data records.
Click on the desired utility in the list and then click the Start button or press the Enter key.
Continue

1. COMPanion offers an Alexandria v3 to v5 conversion service. Send your Alexandria v3 data to COMPanion with a PO for part number D5399 and we'll convert your data for a flat $200. This includes full conversion from v3 to v5—you'll receive back a CD-ROM via Federal Express with an Alexandria v5 folder ready to drag to your desktop. Your data will be imported and your system registered. All you have to do is drag an icon.

Step 6. Select **Transfer Data to v4.0** and click on the **Continue** button.

Step 7. During export, a window will be displayed giving you status on the export of your data.

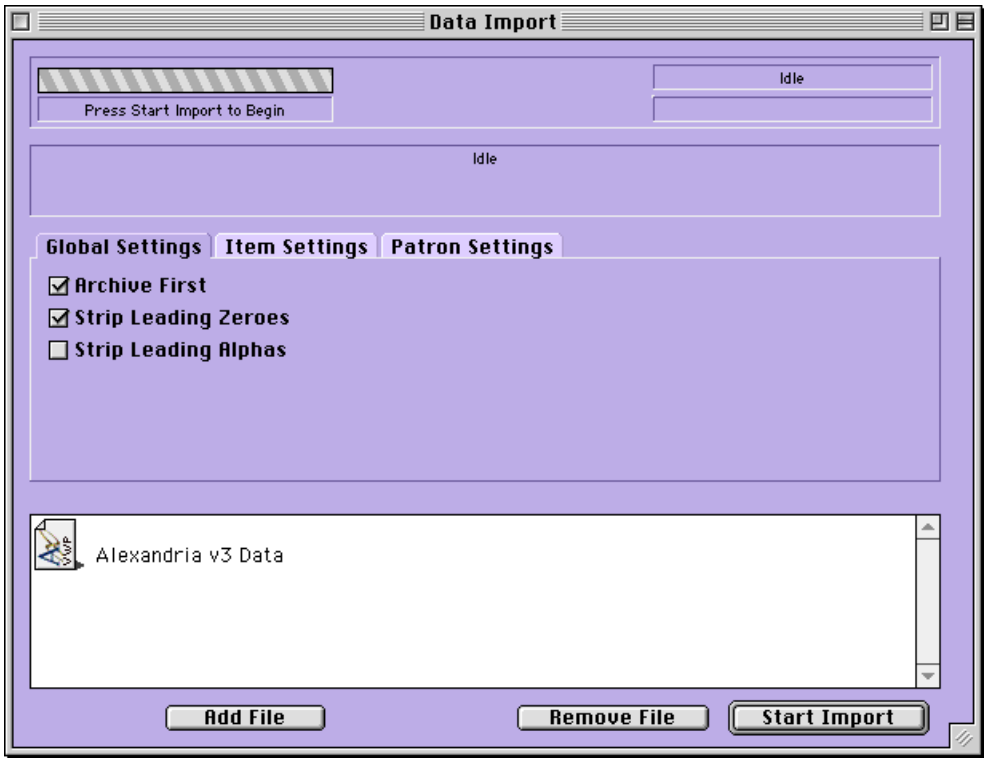
Step 8. When the export is complete the window will display "**Finished Exporting Record. Press OK to Continue**." Click on **OK**.

Step 9. All your v3 data has been exported and can be found in the same folder as your Alexandria program with the name **Alexandria v3 Data**.

Step 10. Copy this file to your Alexandria v5 folder.

Step 11. Drop the file on top of the **Alexandria** Data Station Circulation window or program icon. Or, select the **Alexandria v3 Data** file using **Import** from the **File** menu.

Step 12. The Data Import window is displayed.



Step 13. Click on the **Start Import** button to begin the data transfer process. As your data is getting imported, you'll see the transaction log updated. For the best performance, don't use your computer for other activities until the import is complete.

Step 14. You should save your **Alexandria v3 Data** and v3 backup file for archive purposes.

Step 15. Congratulations! When the import is completed, you are ready to use Alexandria v5 to manage your library.

Step 16. It is recommended that you review and renew all of your preferences, as there are several new options, calendars, and passwords that do not transfer from **Alexandria v3**.

Transferring data from Alexandria v4

If you are upgrading from Alexandria v4 follow these simple instructions to transfer all your data into Alexandria v5.[1]

Step 1. Backup your **Alexandria v4 COMPanion Data** folder.

Step 2. Update to Alexandria version 4.44 or later.

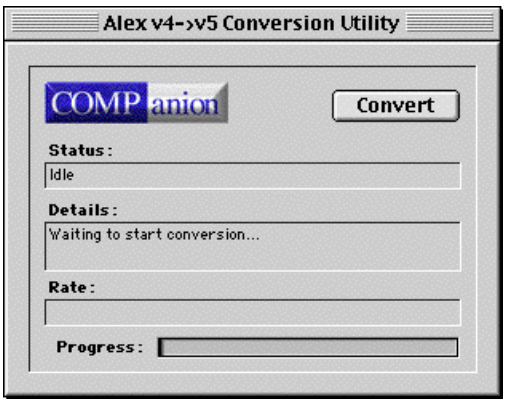
Step 3. Run the **Reorganize datafile** utility on **All Groups**.

Step 4. Run **Verifies on Items, Patrons and Transactions**.

Step 5. Copy the **Alexandria v4 to v5 Conversion** program from a COMPanion CD or download the latest from the COMPanion Web site into your Alexandria v4 folder.

Step 6. Double-click on the **Alexandria v4 to v5 Conversion** program icon.

Step 7. To begin the conversion process, click the **Convert** button.



Step 8. During conversion, the utility will display status in the **Status** and **Details** panes. The conversion program creates an **Alexandria Data** folder and copies all your library data from your Version 4 **COMPanion Data** folder. Your Version 4 data is not modified in any way. Save it for archive purposes.

Step 9. Unless you already have, install Alexandria v5 according to the instructions in this chapter—don't register the program right now, you'll do that after you move your converted data.

Step 10. Copy the **Alexandria Data** folder created by the **Alexandria v4 to v5 Conversion** program into your **Alexandria v5 folder** replacing the empty folder created by the installer.

Step 11. That's it! Your Version 4 data has been converted and moved into Version 5. Launch Alexandria v5 and enter your registration information to begin using the new system.

Step 12. For archive purposes, save your old COMPanion Data folder until you've confirmed that all your data was correctly processed. If you have any problems, call COMPanion technical support.

1. COMPanion offers an Alexandria v4 to v5 conversion service. Send your Alexandria v4 data to COMPanion with a PO for part number D4399 and we'll convert your data for a flat $200. This includes full conversion from v4 to v5—you'll receive back a CD-ROM via Federal Express with an Alexandria v5 folder ready to drag to your desktop. Your data will be imported and your system registered. All you have to do is drag an icon.

Transferring data from AfW

If you are upgrading from AfW (Alexandria for Windows) v5.33 or later, follow these simple instructions to transfer your item data into Alexandria v5.[1]

Should you have questions or encounter problems, call the COMPanion Windows Technical line at 1-800-320-5830 or Email us at "`winsupport@companioncorp.com`".

Step 1. Backup your **LOASIS** folder!

Step 2. Make sure you have upgraded to AfW 5.33. You can find which version of AfW you are currently running by looking on the main menu of AfW at the second folder from the top. It will say "Alexandria 5.xx." If you do not have AfW v5.33, upgrade to this version before following these instructions.

Step 3. Verify that Alexandria v5 has been installed according to the instructions in this chapter.

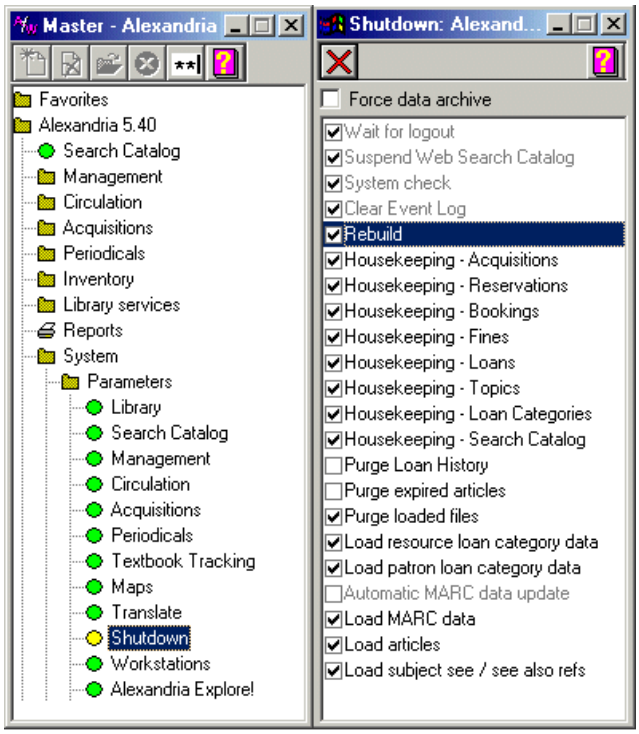
Step 4. Prepare AfW to export your data for transfer to Alexandria v5.
Locate the **Oasis/Loasis/LMarc.d** file in your Oasis directory. Double-click on **LMarc.d** and wait for the two tone DOS window to appear. Press `<esc>` once on your keyboard, so that the entire screen is now a dark blue. Press `<F6>` on the keyboard and scroll down using the keyboard to the word **Zap**. Press `<enter>` and press `<Y>` for Yes. You should see confirmation that the file is Zapped. Press `<F6>` again, scroll down to **Pack**. Press `<enter>`, then press `<Y>` for Yes. You should now get confirmation that the file is Packed. Press `<esc>` twice, then press `<Y>` for Yes. The Marc file is now Zap/Packed, so it will export your data correctly.

- NOTE -

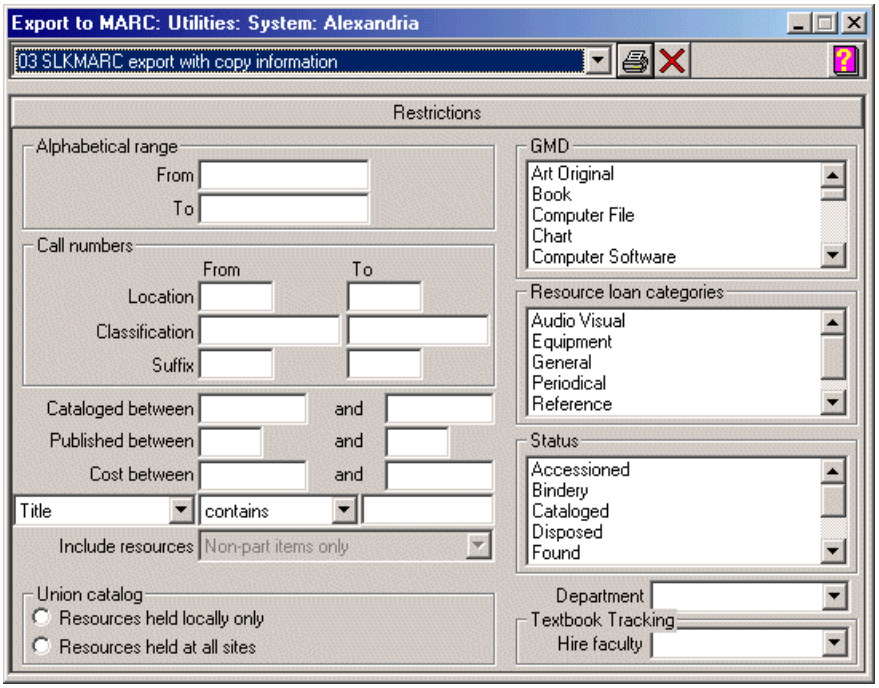
When importing your AfW data, Alexandria will automatically create new Alexandria v5 policies based upon the AfW Resource Loan Categories exported by AfW. On import, Alexandria v5 expects policy codes up to 4 characters long so when your AfW data is imported, the first 4 characters of the Resource Loan Categories are considered the Policy Code for v5. Although you can correct policy import problems after import, it's easier to check your AfW Resource Loan Categories to ensure that the first 4 characters of the description are unique.

1. COMPanion offers an AfW to v5 conversion service. Send your Alexandria AfW data to COMPanion with a PO for part number D7399 and we'll convert your data for a flat $200. This includes Item and Patron conversion from AfW to v5—you'll receive back a CD -ROM via Federal Express with an Alexandria v5 folder ready to drag to your desk-top. Your data will be imported and your system registered. All you have to do is drag an icon.

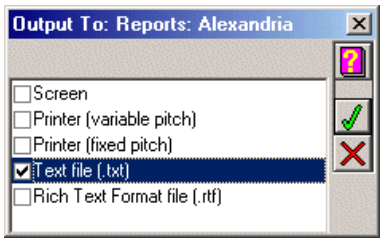
Step 5. Rebuild your AfW data to ensure that the database is in good shape. Launch AfW, then go to **System**, then **Parameters**, and select **Shutdown**. Place a check mark in the **Rebuild** box and perform a full shutdown of the system.



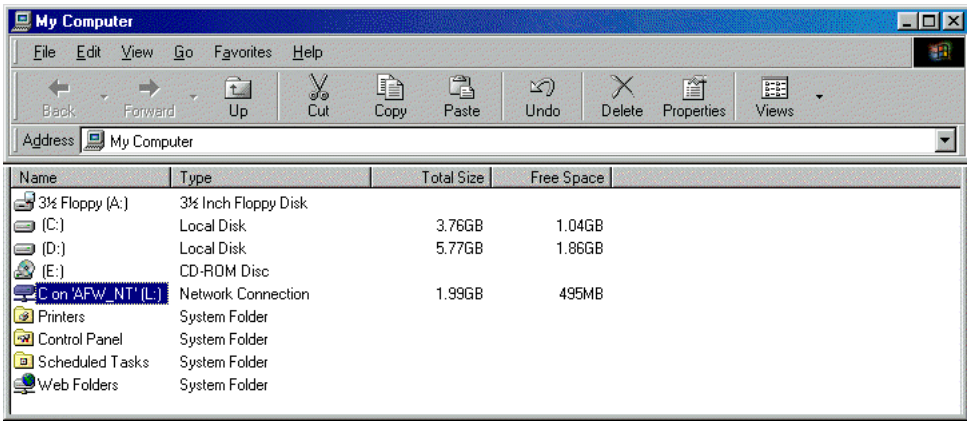
Step 6. Launch AfW 5.33, and then go to **System**, then **Utilities**, and open up **Export to Marc**.



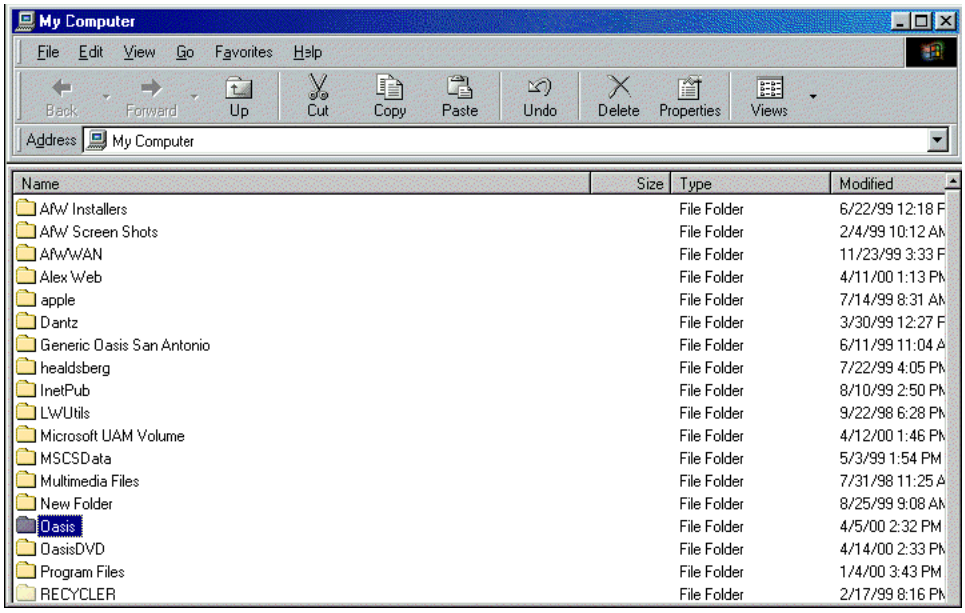
Step 7. From the top drop down menu, select **03 SLKMARC export with copy information**. Click on the printer icon, then select export to a Text file *("*.txt")* and click the little green check mark. Once AfW is through with the export, exit AfW.



Step 8. To find your exported data, select **My Computer** from the Windows Desktop.


My Computer
File Edit View Go Favorites Help
Back Forward Up Cut Copy Paste Undo Delete Properties Views
Address My Computer
Name Type Total Size Free Space
3½ Floppy (A:) 3½ Inch Floppy Disk
(C:) Local Disk 3.76GB 1.04GB
(D:) Local Disk 5.77GB 1.86GB
(E:) CD-ROM Disc
C on 'AFW_NT' (L:) Network Connection 1.99GB 495MB
Printers System Folder
Control Panel System Folder
Scheduled Tasks System Folder
Web Folders System Folder

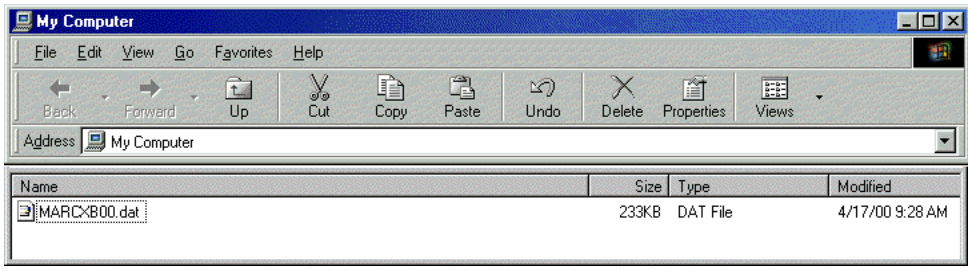
Inside **My Computer,** select the drive that AfW is installed on (this is usually a mapped drive, often called the "L Drive," but could be called almost anything). If you are having problems locating the drive or directory in which you installed Alexandria, talk to your network administrator or try the following: close or minimize everything and do a right-click on your AfW icon. On the new window that comes up, left-click the Shortcut tab. On this tab you should have a field that is called Target.


My Computer
File Edit View Go Favorites Help
Back Forward Up Cut Copy Paste Undo Delete Properties Views
Address My Computer
Name Size Type Modified
AfW Installers File Folder 6/22/99 12:18 F
AfW Screen Shots File Folder 2/4/99 10:12 AM
AfWWAN File Folder 11/23/99 3:33 F
Alex Web File Folder 4/11/00 1:13 PM
apple File Folder 7/14/99 8:31 AM
Dantz File Folder 3/30/99 12:27 F
Generic Oasis San Antonio File Folder 6/11/99 11:04 A
healdsberg File Folder 7/22/99 4:05 PM
InetPub File Folder 8/10/99 2:50 PM
LWUtils File Folder 9/22/98 6:28 PM
Microsoft UAM Volume File Folder 4/12/00 1:46 PM
MSCSData File Folder 5/3/99 1:54 PM
Multimedia Files File Folder 7/31/98 11:25 A
New Folder File Folder 8/25/99 9:08 AM
Oasis File Folder 4/5/00 2:32 PM
OasisDVD File Folder 4/14/00 2:33 PM
Program Files File Folder 1/4/00 3:43 PM
RECYCLER File Folder 2/17/99 8:16 PM

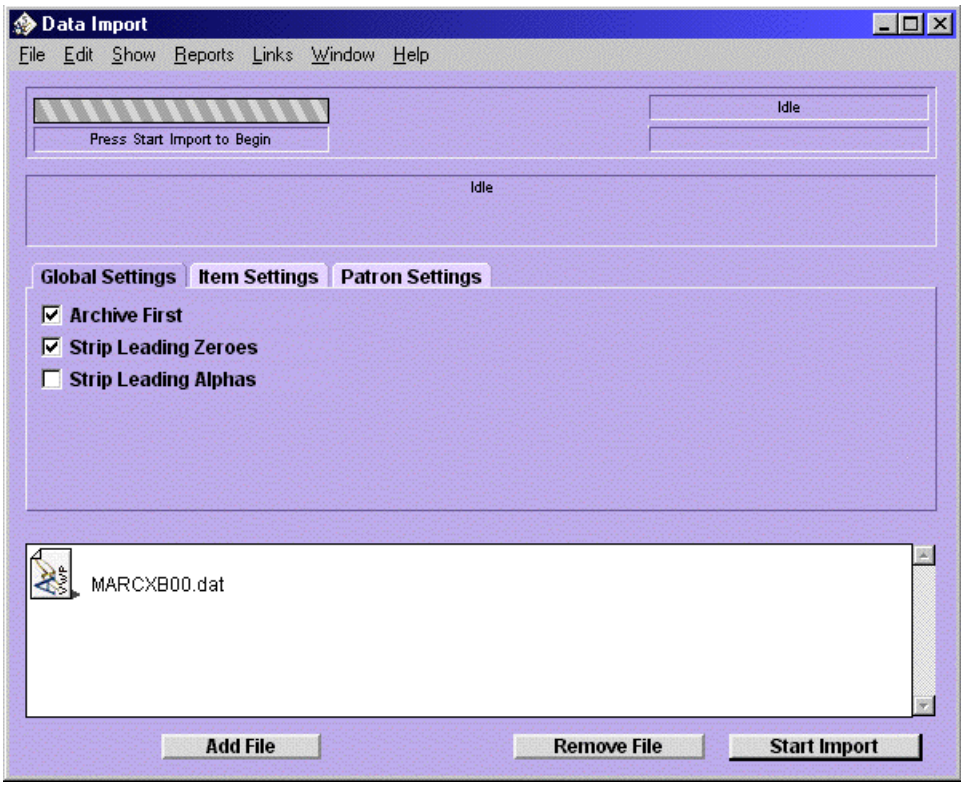
The Target field contains the correct path to your data and should appear similar to "`C:\OASIS\AfW.exe`" if your data is on the C drive (note: C is a variable which represents the hard drive that AfW was installed to—it may not be the same on your computer). If the Target Field starts with slashes (i.e. //), you may need to contact your network administrator.

On your drive, open the OASIS folder and then look for a folder named **REPORT**. In the example of the "C drive," your path would look as follows: `C:\OASIS\REPORT` (where C:\ is the hard drive that AfW is installed to), OASIS is the install directory, and REPORT is the directory that Alexandria uses for storing reports generated to Text files.

Inside the **REPORT** folder, you may have several files, or you may have only one. Look for a file named **MARCXB**.DAT**, where the asterisks represent the order of multiple exports. If this is your first Marc export, this file will normally be called **MARCXB00.DAT**. If you've run several reports, including other Marc exports, you may need to search for this file.


My Computer
File Edit View Go Favorites Help
Back Forward Up Cut Copy Paste Undo Delete Properties Views
Address My Computer
Name Size Type Modified
MARCXB00.dat 233KB DAT File 4/17/00 9:28 AM

Step 9. To import your item data, do the following: minimize the **My Computer** window and launch **Alexandria v5**. Once Alexandria is open, go back to the **My Computer** folder. Drag the file **MARCXB**.DAT** from **My Computer** and drop it on the Alexandria Circulation window. This should cause Alexandria to open the Import window.



Step 10. Since you are importing from an existing AfW data file, you don't need to select any import options. Click **Start Import**. Alexandria will do your import and log everything that occurred during import on the Circulation window.

Step 11. Verify your data and make backups.
Verify that your data was correctly imported. Check a few of your books using the Alexandria **Items** window to make sure that everything looks correct. Finally, make a backup of your new data by opening **My Computer** and then selecting the Alexandria v5 folder. The default path is `C:\Program Files\Alexandria`. From there copy the **Data** folder to your backup media. Also, make one last copy of your OASIS folder from AfW for archiving purposes. Store the old data in a safe place.

Step 12. Read your Alexandria v5 User's Manual. Review your new Alexandria v5 Preferences to make sure they meet the needs of your library. Since Alexandria v5 and AfW are ***very*** different programs you should spend a few hours exploring the program.

Alexandria Basics

This chapter describes menus and basic operational rules used in Alexandria.

Menus in Alexandria follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Alexandria are very similar to the **File** and **Edit** menus in other applications. Additional menu items have purposes specifically related to library management.

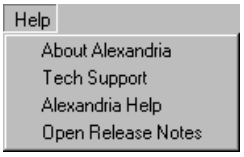
Alexandria looks and operates almost exactly the same on Macintosh and Windows. However, the operating systems *are* dissimilar, and there are some minor differences between environments. For example: on the Macintosh you press the `<command>` key for menu shortcuts, and in Windows you select the `<ctrl>` key. Windows and Macintosh have different controls for minimizing, closing, and resizing windows. In order to keep the documentation as clear as possible, this manual will generally discuss actions rather than operating system specific commands or controls. Therefore, rather than say "click the close box at the upper right of your window," the manual would say, "close the window," and let the user select the operating system specific commands required to control Alexandria.

This manual contains images from both Windows and Macintosh versions of the Alexandria.

Macintosh vs. Windows command differences

Macintosh Command Key	Windows Command Key	Usage
`<command>`	`<ctrl>`	Perform Menu shortcuts.
`<option-tab>`	`<ctrl-tab>`	Perform Authority Control.
`<option>`	`<ctrl>`	Display Tool Tip.
`<option>`	`<alt>`	Used to modify commands.

The following sections describe the basic operational elements found in Alexandria.



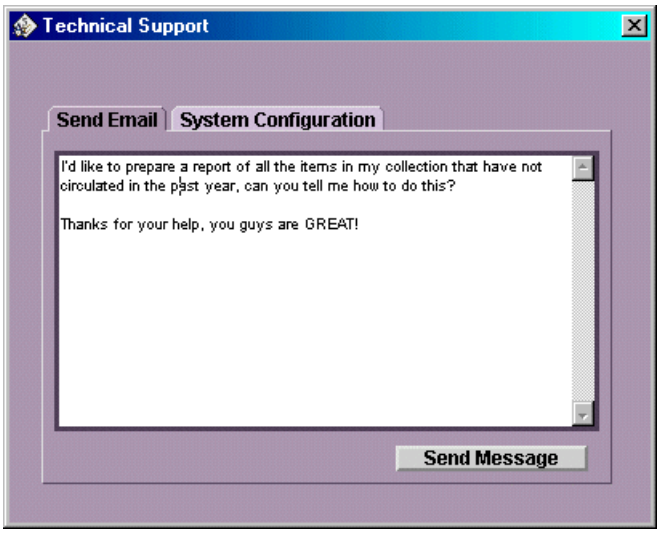
About/Help Menu

On Macintosh there is an "Apple Menu"(🍎) which contains the **About Alexandria** and **Tech Support** selections. There is also a "Help Menu" which contains help selections. On Windows, these selections are located under the Help menu.

About Alexandria—shows copyright and version information.

Tech Support—This opens the **Technical Support** window, allowing you to send Email to COMPanion if you are connected to the Internet—even if you don't have a personal STMP address configured.

If you have an open connection to the Internet, you can use the **Send Email** tab to send questions to COMPanion's Technical Support group. Describe the nature of the problem you need help with or a question you need answered.


Technical Support
Send Email
System Configuration
I'd like to prepare a report of all the items in my collection that have not circulated in the past year, can you tell me how to do this?
Thanks for your help, you guys are GREAT!
Send Message

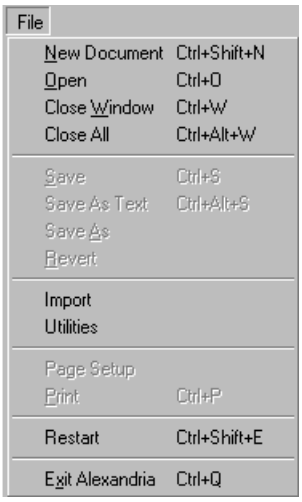
Click **Send Message** to send the notice directly to:
`"v5support@companioncorp.com"`

If you haven't entered a Library Email address in your preferences *(see "Email" on page 88)*, you will not be able to send Email to Technical Support. However, Alexandria doesn't check to see if this address is valid, so any address that looks good will be accepted by Alexandria. If you are using this technique to fool Alexandria, don't forget to explain this in your message, and provide your return contact information—otherwise Technical Support will respond to your made up Email address and you won't receive the help you need.

The **System Configuration** tab contains information about your system. This information is automatically attached to your Email messages so that our Technical Support staff has all the basic information possible to help solve your problems and questions.

Alexandria Help—If the Alexandria Help documents are installed in your system, this selection brings up the "**Help Index.vwp**" document. Alexandria Help documents are installed in the **Help** folder inside your **Alexandria folder**.

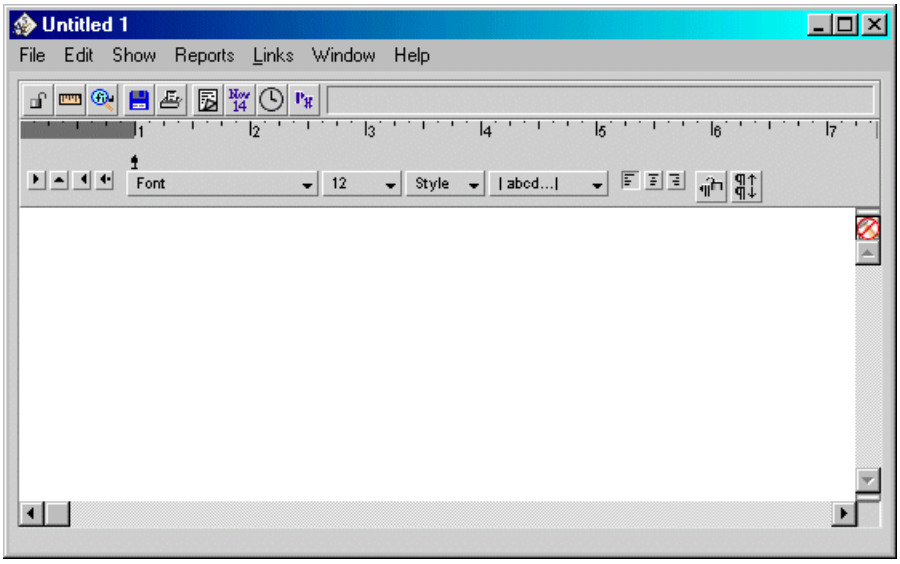
Open Release Notes—If the Alexandria release notes are available, this selection shows them. If available, this document is in your **Alexandria folder** and is named **Alexandria Release Notes.txt**.



File Menu

The Alexandria **File** menu provides the following selections.

New Document—Opens a new VWP document. VWP stands for Virtual Word Processor, Alexandria's integrated word processor.



Open—Shows the standard operating system window to locate a file. When you select a document in this window, Alexandria opens it. Use this command to open VWP documents, TEXT documents, Marc documents, MicroLIF documents and other files for viewing.

Close Window—Closes the top window.

Close All—Closes all windows except for the **Circulation** window.

Save—Saves the contents of the top window.

Save As Text—Saves a copy of the currently visible word processing document in a TEXT format.

Save As—Allows you to save ".vwp" documents to other locations on your hard drive.

Revert—Changes to the current record are discarded and the original record is displayed in the window.

Import—Shows an open dialog for selecting an import file. Import files can also be "dropped" on the transaction window. The **Import** and **Open** commands are different in that the **Import** command ASSUMES you want to import data if the selected file is a valid import file. The **Open** command ASSUMES you want to view the data file, even if it's a valid import file *(see "Data Import" on page 351)*.

Utilities—Utilities are used to export data or make global changes on information in the Alexandria data file *(see "Alexandria Utilities" on page 329 for more information)*.

Page Setup—Operating System standard function which sets the page up for printing.

Print—Prints the information in the top window. For example, if the **Patron** window is on top, information for the Current Patron is printed when this command is selected. If the **Circulation** window is on top, then the Circulation log is printed.

Restart—Logs out the current users, closes all windows, restarts the Alexandria program, and if security is turned on, brings up the login dialog. If no security has been activated, Alexandria just restarts.

Quit/Exit Alexandria—Quits the Alexandria program.

Edit Menu

This menu includes standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to Alexandria are included below.

Undo—This command only undoes typing or cut and paste operations in individual fields or in the word processor. It does NOT undo operations from other menus, commands and controls.

Redo—An Undo for the Undo.

Cut, Copy and **Paste—**You can cut, copy, and paste text from certain fields to others within Alexandria. For example you can cut text from the **Title** field and place it in the **Notes** field. You cannot cut and paste entire library records. If you need to transfer entire records into another application, use the **Export** function to save the records you need in a format compatible with other programs.

Clear—Clears the selected text or selected list elements.

Select All—Selects all the text in the current edit field, current word processor document, or list.

Speak Text—If your machine has speech enabled, this menu is active when applicable. This command speaks the contents of the currently selected text, line, or record using the speech preferences you've selected.

Find—This selection opens the **Find** window. Depending upon what window is on top, **Find** can be used to locate a specific record from your database or text in a word processing file.

Find Again—Finds the next matching record or data in the word processor.

Paste From File—Allows the user to paste information from a file.

Preferences—This selection opens the **Preferences** window. Preferences are used to customize Alexandria for your needs *(see "Preferences" on page 57).*

Show Menu

Use this menu to move between various Alexandria functions such as patrons, items, and Circulation. For example, if you need to manage patron information, select **Patrons** from the **Show** menu. To check out items or perform other transactions, select **Circulation**.

Each option in the **Show** list has a corresponding chapter in this manual. Refer to the specific chapter for more detailed information about the function.

Bulletin Board—Used to create an electronic library Bulletin Board. Librarian can "post" items on the Bulletin Board, which all patrons can view via Alexandria Researcher. The Bulletin Board also allows the librarian to associate notes or library maps with item call numbers. Thus, when circulated item details are displayed, if an associated note or library map is available, it's automatically included *(see "Library Bulletin Board" on page 52)*.

Patrons—shows the **Patron** window. Select this command to examine, add, modify, or remove patron records.

Items—Shows the **Item** window. Select this command to examine, add, modify, or remove items, titles, or copy records from your library.

Circulation—Shows the **Circulation** window. Select this command if you want to check out, check in, place holds, charge fines, place reservations, accept payments, perform inventory and other Circulation functions. The Circulation window is always open while Alexandria is running (unless logged-in for Researcher-only privileges); use this menu command to bring it to the forefront.

Search—Shows the **Search** window. Select this command to search your library collection.

Orders—Shows the **Orders** management window. Select this command to examine, add, modify, or remove order records.

Budgets—Shows the **Budgets** management window. Select this command to examine, add, modify, or remove budget records.

Vendors—Shows the **Vendors** management window. Select this command to examine, add, modify, or remove Vendor records.

Subscriptions—Shows the **Subscriptions** management window. Select this command to examine, add, modify, or remove subscription records.

Routes—Shows the **Routes** management window. Select this command to examine, add, modify, or remove route records.

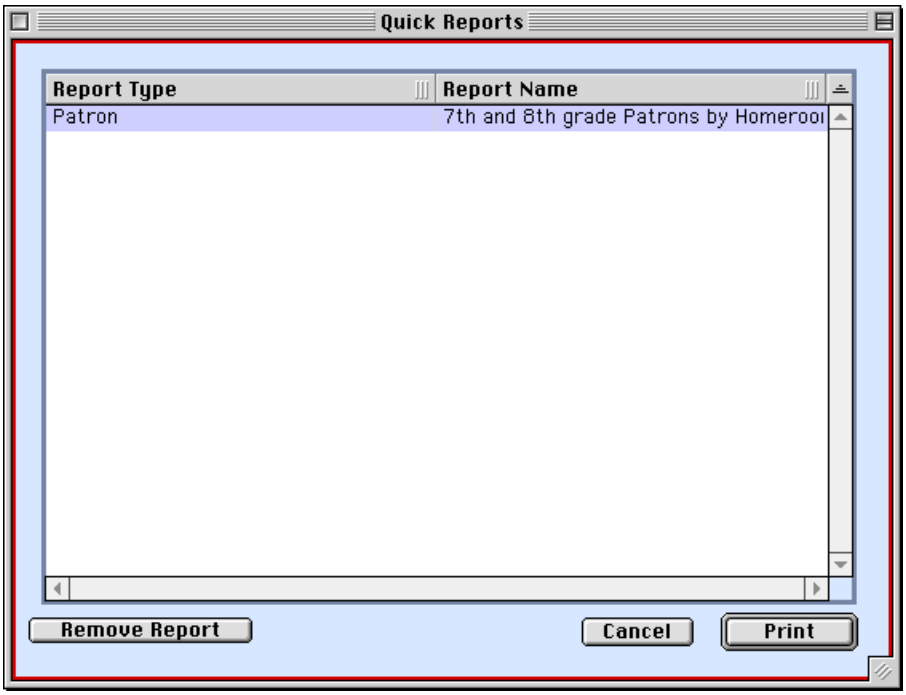
Reports Menu

Use the **Reports** menu to select a report category such as Patron Reports, Item Reports or Circulation Reports. To read more about reports see:

"Introduction to Reports" on page 273
"Item Reports" on page 287
"Circulation Reports" on page 297
"Order Reports" on page 309
"Subscription Reports" on page 315
"Special Reports" on page 319

When you make a selection from this list, the report window appears with a list of reports available in that category.

To access a list of frequently used reports that do not require you to choose any sort or search values, choose **Quick Reports** from the **Reports** menu. The following window appears.



You can double-click or select a report and click on **Print** to generate the report without further data entry.

- NOTE -

You create the reports that are shown in the Quick Reports dialog. To create a quick report, choose a report (with options) and then click on the **Create Quick Report** button *(see "Creating Quick Reports" on page 276)*.

Links Menu

The **Link** menu provides an easy way for you to quickly jump to other programs and resources that you may need for your work. Alexandria includes a link to the **Declaration of Independence** and the **United States Constitution** as example defaults.

A **Link Menu** folder is automatically created in the same folder as your Alexandria program. Any document or program you place in this folder gets displayed in the **Link Menu**. When you select an item on this menu, that document or program is launched.

The contents of the **Link Menu** folder on the Data Station are automatically copied to the **Link Menu** folder of Alexandria Workstations the *first* time the workstation client is run. After the Link Menu Folder has been created, any changes made to a particular workstation *are for that workstation only.* However, if the Link Menu Folder is deleted, the workstation will create a new one the next time it's launched and the default documents will again be copied automatically from the Data Station.

Window Menu

As you open different windows within Alexandria, the **Window** menu will display a list of all currently active windows. This example shows that the Circulation window is open and active and the Preferences and Patrons windows are also open.

To choose a window, select it from this menu. The window you choose is displayed and becomes the active window.

When you close a window, it is removed from this menu.

Management Command Menus

The main window for each Alexandria management function includes a command menu. The commands within these menus are not always the same for every function, but many commands are used throughout the program. The following section describes how to use the standard functions in most of the management command menus.

The following sections describe how to use the command menu selected from the **Patrons** menu, which is active when the Patron window is the topmost window. Use these menus to browse, find, add, and remove records. Other windows have similar controls.

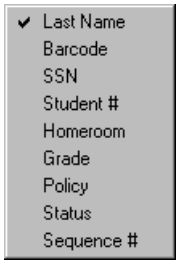
The **First**, **Previous**, **Next**, and **Last** commands display the indicated record (first, previous, next, last) based on the order of the records shown in the **Browse By** field. The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.[1]

First—Shows the first record according to the current **Browse By** order.

Previous—Shows the previous record according to the **Browse By** order.

Next—Shows the next record according to the **Browse By** order.

Last—Shows the last record according to the **Browse By** order.



Finding Records

The **Find** command under the **Edit** or **Command** menu can be used to locate a specific record. Alexandria searches for a record that matches the information you enter and shows the complete record in the main window.

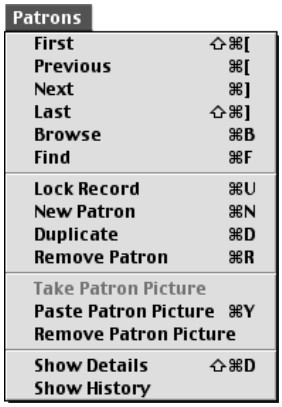
For example, if you search for a patron with the name `Anderson`, Alexandria finds the first patron record with that name and shows it as the Current Patron in the **Patrons** window. The **Browse By** selection is automatically set to match your **Find** field.

When you choose the **Find** command, the following window appears.

Click the arrow at the end of the **Last Name** field to choose to search other fields[2]. Click the arrow at the end of the field to choose to search for an item that starts with the string you enter or exactly matches the string you enter. If no record can be located, Alexandria will sound an audio alert and the current record will not be changed.

Click the **Find** button to locate the record, or click the **Cancel** button or close box to cancel the Find operation.

1. Shortcut—Hold the <shift> key down when you click on the left arrow to select the **First** record and <shift>-click on the right arrow to get the **Last** record.
2. Note—Because the terms shown in this menu can be customized by the user, your choices may have different names.

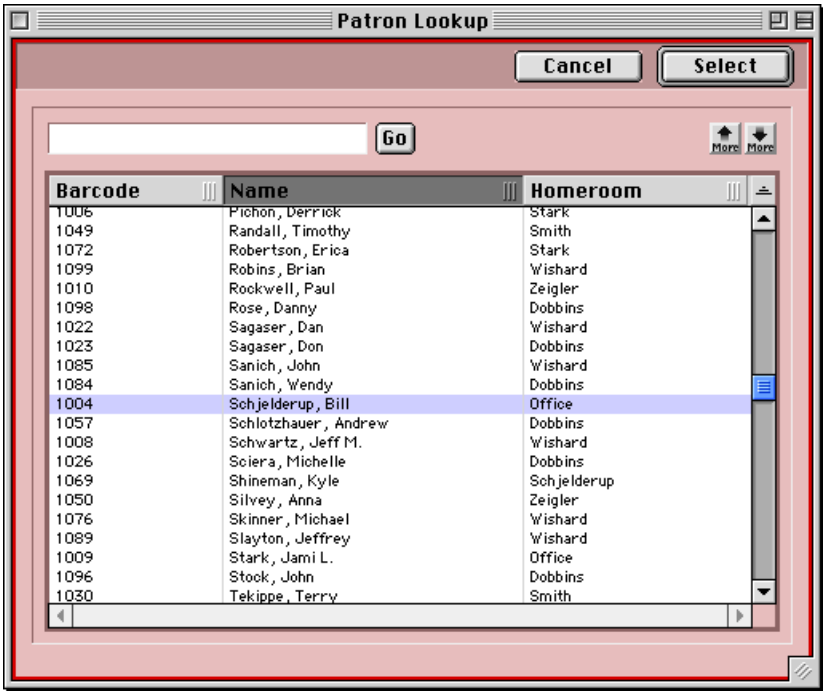


Browsing Records

As an alternative to the **Find** command, use the **Browse** command (**Show**, **Patrons**, **Patron menu**, **Browse**) to locate the record you want to view. The initial window shows records before and after the currently selected record.

Use the up and down arrow keys on your keyboard to move the selection bar through the list. To display more items, click on the **More** buttons on the top right of the window.

To position the browser elsewhere, enter text in the empty field to the left of **Go** and then click on the **Go** button. For example if you enter `"Sch"` for a Patron name, a list of names that begin with "Sch" will be displayed. You can then select a specific record from the list.



To select an item in the list, either double-click on the item or click on the item once then click on **Select**—or press `<enter>` or `<return>` on your keyboard.

When you select a record in the **Browse** window, that record is displayed. To exit the **Browse** window without changing the current record, click the close box or **Cancel**.

The **Browse** window shows entries in the order specified by the **Browse By** setting of the initial record management window.

In this example, records displayed in the window are sorted by Name, the value displayed in the **Browse By** field at the top of the Patron window.

Changing the **Browse By** field also changes the index pull-down menu on the **Find** menu.

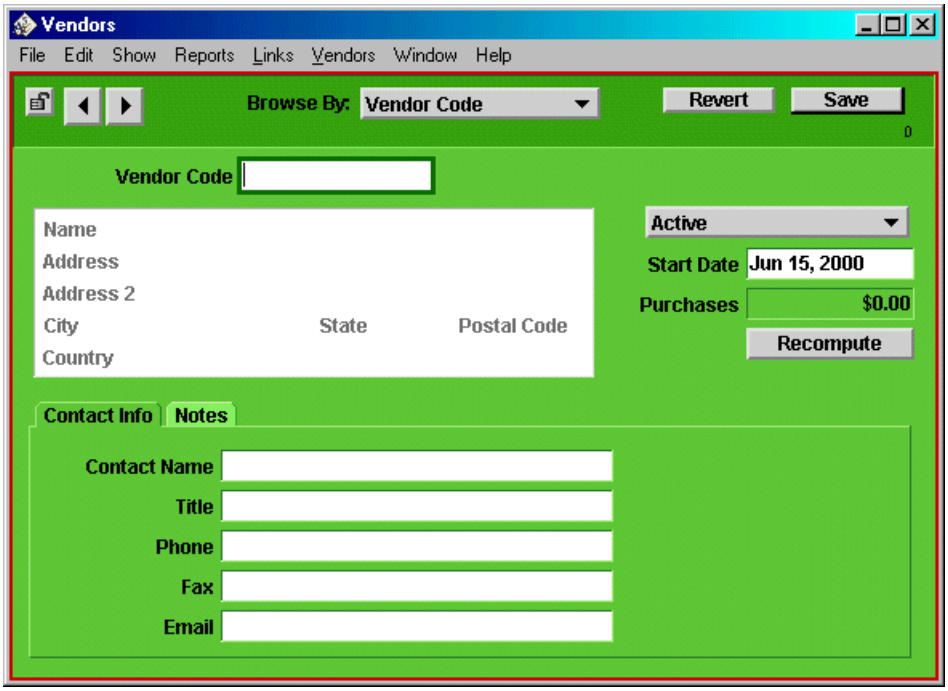
Changing Records

Before records can be changed, they must be unlocked. Use the **Unlock Record** command in the control menu to **Unlock** the current record. Display Setting preferences can be set to automatically lock or unlock records for modification *(see "Display Settings Preferences" on page 81)*.

Adding Records

Use the **New** command to add records to your Alexandria database.

When you select this command, a window pops up—prompting you for information. The following example shows the **New Vendor** display window.

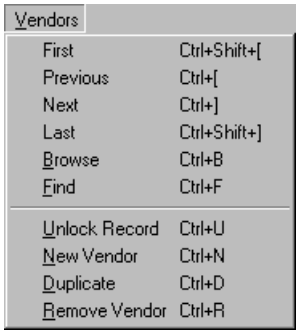


Type over the grayed-out data entry fields in the window (such as **Name**, **Address**, and so forth in the example above) to add a new record.

To move to the next data entry field (pull-down menu or button), press the <tab> key. To move to the previous data entry field (pull-down menu or button), press <shift-tab>. To edit a data entry field, click in the corresponding field. To change a selection in a pull-down menu using only your keyboard, use the <up> and <down> arrow keys when the pull-down is outlined. When a button is outlined and you wish to perform that action, press the <spacebar>.

When you enter any type of specially formatted information such as dates, phone numbers, and social security numbers, you can enter values in a wide range of formats. For example, you can enter the date December 1, 2002 as: "Dec 1, 2002" or "12/1/02"[1] or "12.1.02" or "12 1 02". If the year is 2002, you can just enter "12/1". If the current month is December, you can just enter "1".

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.



When you have entered all the information for this record, click the **Save** button in the upper right-hand of the window. The record has now been saved. If you want to disregard the information you have entered, click the **Revert** button and the previous record information will be restored.

If you try to select another record or leave the window without saving your changes, the following warning message will be shown:

Message
The current record has not been saved. Do you wish to save it before viewing another record or window?
Cancel
Discard
Save

If you click on **Cancel**, you'll return to the previous window with your newly entered information intact. Click the **Discard** button if you want to disregard the data you just entered. Otherwise, click the **Save** button to save your input.

Duplicating Records

Use this command to copy information from the current record into a new record. You can then modify the record to create a new one. This will save the time when you add records that are similar.

Removing Records

Use this command to permanently delete a selected record.

In most cases, a warning window will ask you to verify that you want the record permanently removed.

Click the **Remove** button to permanently remove the record or the **Cancel** button to ignore the request to remove the record.

WARNING!
You cannot undo a remove!

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations the patron has pending.

The Alexandria Word Processor

Integrated into Alexandria is a powerful word processor. In this day and age, everyone owns at least *one* word processor, so why is the Alexandria approach to an integrated Word Processor so much better? Here are a few reasons...

- The word processor is used throughout Alexandria to display reports and other information windows. In most programs, this information is displayed in a standard window.
- Allows users to save reports for future reference. Word processor documents can be viewed, saved and printed.
- Allows users to customize reports. You can pick the font, eliminate unwanted information, enter notes, change the font size, update the heading, and much more. You can have your reports done YOUR WAY.
- Quickly create your OWN reports by cutting and pasting information from Alexandria reports.
- Send reports to others via Email attachments—since you can Save reports, you can electronically send them.
- The Alexandria word processor can open HUGE files that many word processors can't open. Thus, you can view large import files before you import them—even 100MB files!
- Since all reports are created as word processor documents, you can preview each report before you print them. Mother Nature, as well as your printing budget, will thank you. Other word processors might allow you to view reports on-screen, but usually only one page at a time, or a very limited page range. With Alexandria's virtual word processor, you can see it all.
- The Alexandria virtual word processor can provide your institution with a standard cross platform tool for creating and exchanging reports. All documents are supported across both Macintosh and Windows systems.
- Alexandria can prepare several reports for printing simultaneously. Most systems won't let you print more than one report at the same time—after all, in what order would the pages come out of the printer? With the Alexandria approach, all reports are prepared in the virtual word processor and can be printed at a later time.

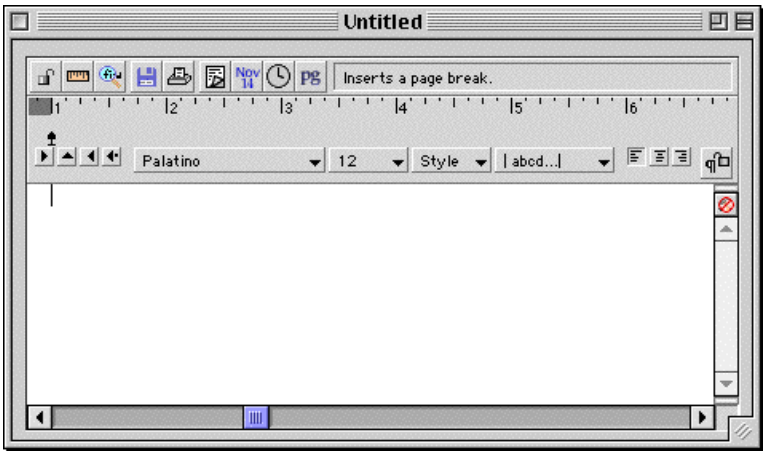
The Alexandria word processor is named VWP (**V**irtual **W**ord **P**rocessor) since it uses a highly efficient virtual memory scheme, which allows it to support very large documents in a limited amount of memory.

VWP is available integrated within Alexandria, and as a stand-alone product. VWP is available for both Macintosh and Windows-based operating systems. VWP documents are fully cross platform—a document created on one can be viewed on the other.

VWP has the ability to support pictures files created in drawing or paint programs—just paste them into your document.

Special support is specifically provided for code 39 barcodes so that they are printed at the highest possible resolution your printer is capable of handling. Therefore, with barcodes, what you see isn't exactly what you'll get. When printed, barcodes are printed at the highest possibly quality setting.

To create a new word processor document, select **New Document** from the **File** menu. You'll see a window similar to this one.

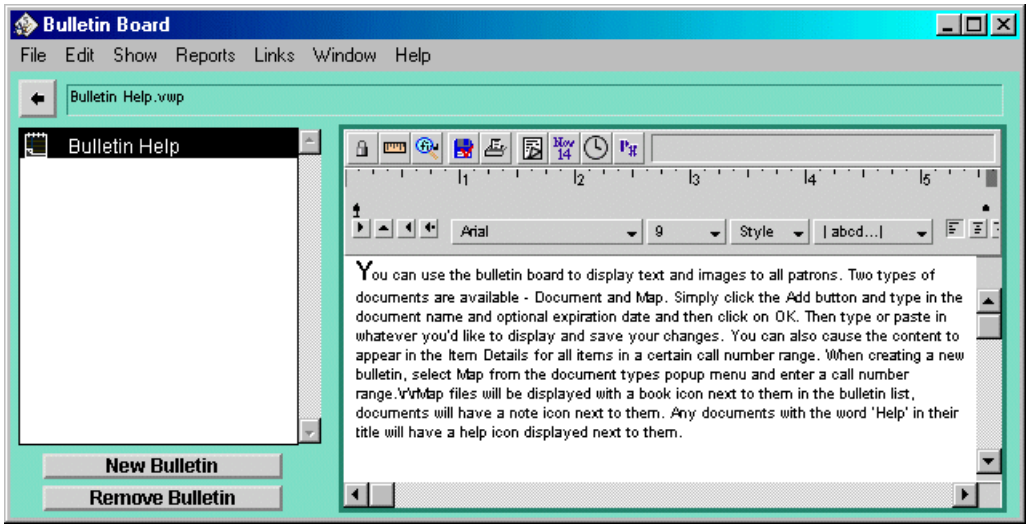


As you move your cursor over window controls, hot tips are displayed on the top right of the window. Since most people are familiar with word processors, VWP basic operations will not be documented. However, here is an overview of some of the special features available within the Virtual Word Processor.

- Use the icon above the vertical scroll bars to hide/show the word processor controls.
- Click on the ruler icon to show or hide the graphical ruler.
- Click on the lock icon to lock or unlock the document. Locked documents can not be modified.
- Use the other icon controls to find text, save a document, print your document, set a page break, insert the date, insert the time, insert the current page number.
- Indents, margins, left, right, center and decimal tabs are supported.
- Left, Center and Right aligned paragraphs are supported.
- Font, Size and Style controls are available for any character. Style includes colored text.
- Paragraph "keep together" controls are supported.
- Supports headers and footers. To create a header or footer, drag the controls above and below the vertical scroll bars to create a header or footer area.
- Supports restricted column viewing for tabbed columns. When this is turned on, text that might overflow into another column is visibly truncated so that printed columns look nice. Since the data is still in the report, adjusting column width will expose more data. This is a very useful feature for viewing tabular-type reports.
- Supports URL links—<command>-click on a URL in VWP to display the link in your selected browser.
- Supports internal hot links for URL, VWP links and multi-media display. This capability is only available (right now) for documents created by Alexandria. It's mentioned here because it's a valuable capability of virtual word processing that makes using Alexandria much more enjoyable and powerful.

Library Bulletin Board

The Bulletin Board is used to create an electronic Bulletin Board for your library. A librarian can "post" items on the Bulletin Board, which all students can view via Alexandria Researcher. The Bulletin Board also allows the librarian to associate notes or maps with item call numbers. Thus, when item details are displayed, if an associated note or map is available, it's automatically included. Select **Bulletin Board** from the **Show** menu to view the Bulletin Board.

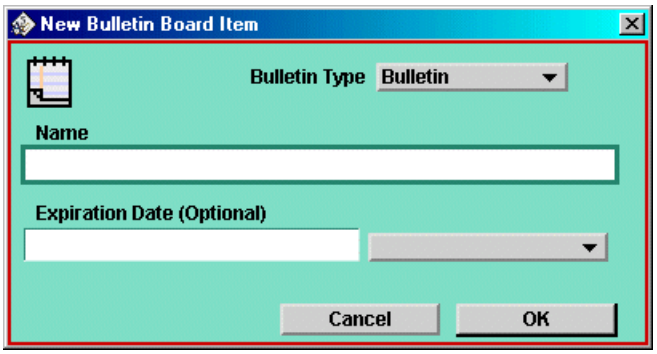

Bulletin Board
File Edit Show Reports Links Window Help
Bulletin Help.vwp
Bulletin Help
Arial
9
Style
abcd...
You can use the bulletin board to display text and images to all patrons. Two types of documents are available - Document and Map. Simply click the Add button and type in the document name and optional expiration date and then click on OK. Then type or paste in whatever you'd like to display and save your changes. You can also cause the content to appear in the Item Details for all items in a certain call number range. When creating a new bulletin, select Map from the document types popup menu and enter a call number range.\r\rMap files will be displayed with a book icon next to them in the bulletin list, documents will have a note icon next to them. Any documents with the word 'Help' in their title will have a help icon displayed next to them.
New Bulletin
Remove Bulletin

To remove an item from the Bulletin Board, select it and click on the **Remove Bulletin** button.

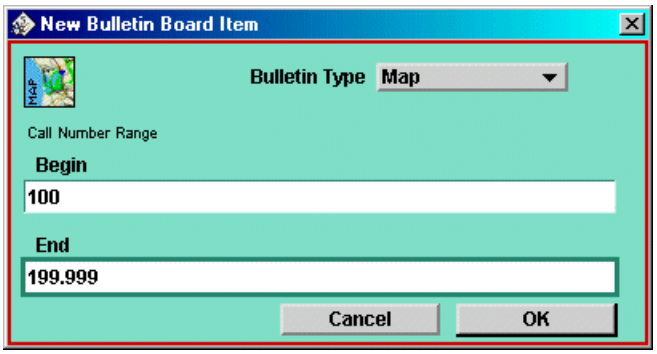
Bulletins can be any Alexandria virtual word processing document. You can even post Alexandria reports as Bulletin Board entries. Thus, rather than posting an overdue report to the wall of the library, you could post it to the Alexandria Bulletin Board.

To print the contents of a Bulletin, select **Print** from the **File** menu, or click on the Printer icon in the word processor control bar.

To add a new Bulletin Board entry, click on the **New Bulletin** button.



Enter the name of the new **Document** Bulletin and an optional **Expiration Date**. If you enter an **Expiration Date**, the item will be automatically removed on that date. To create a new **Map** Bulletin, select **Map** in the **Bulletin Type** pull-down menu.



- NOTE -

Bulletin Board documents are standard word processing documents. They may contain text and/or graphics. Use a drawing program to create your library map and paste it into the word processing document. If you want to add additional text with rules or additional hints on locating items, you can include anything you want.

Although Bulletin Board documents are standard word processing documents, they are transmitted frequently over the network—you'll want to limit yourself to short documents.

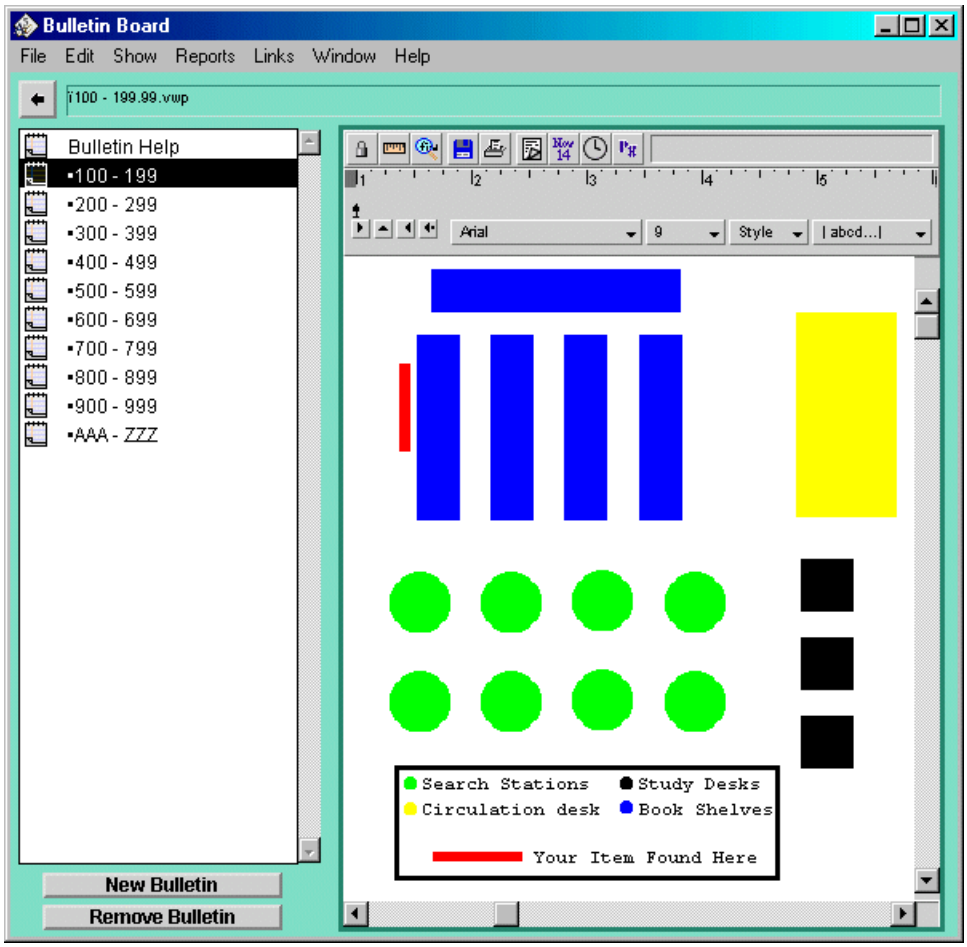
Only Librarian Workstations can **Add** or **Remove** entries from the Bulletin Board. Alexandria Researchers can only view entries. However, since Bulletin Board documents are standard Alexandria word processing documents, librarians can easily accept postings from students who have created their own bulletins using Alexandria Researcher.

Maps

To create a new **Map** Bulletin, select **Map** in the **Bulletin Type** pull-down menu.

Design your map in a program outside of Alexandria, such as Microsoft Paint, MacPaint, Micrografx Picture Publisher, or Adobe Photoshop. When you are finished, **Copy** or **Cut** the image you have draw to your OS clipboard. When you open a new Bulletin Board Map VWP document, you can just **Paste** the image you have draw into the document. The Virtual World Processor supports a majority of simple image file types, such as `.PICT`, `.JPEG`, and `.GIF`. Regardless of your operating system, COMPanion recommends that you have QuickTime installed on your computer.

Your new map may look like this.

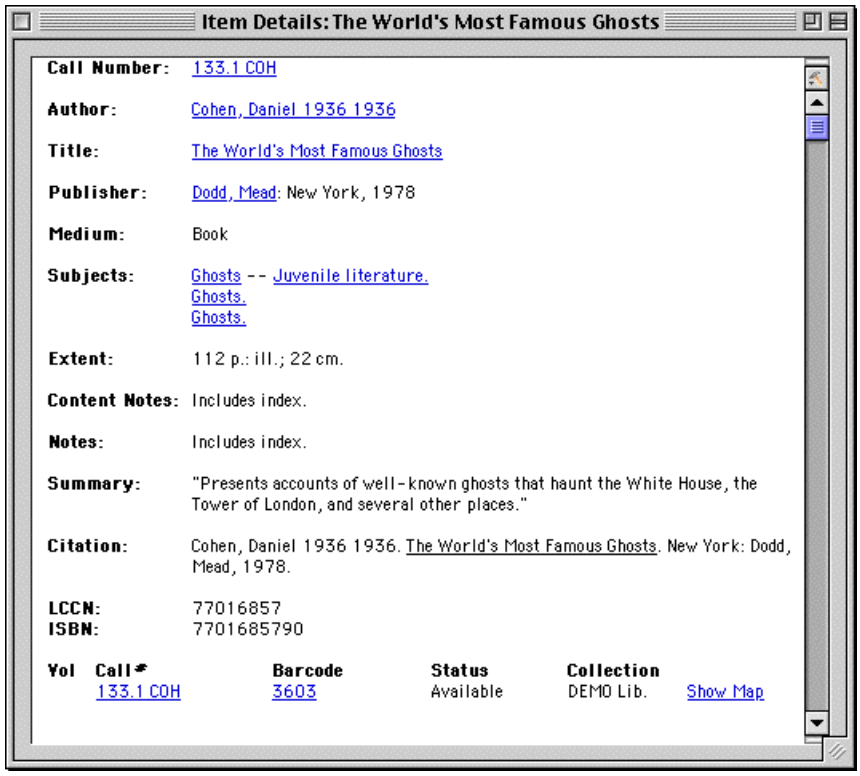


Maps are always displayed at the bottom of the Bulletin Board list of items.

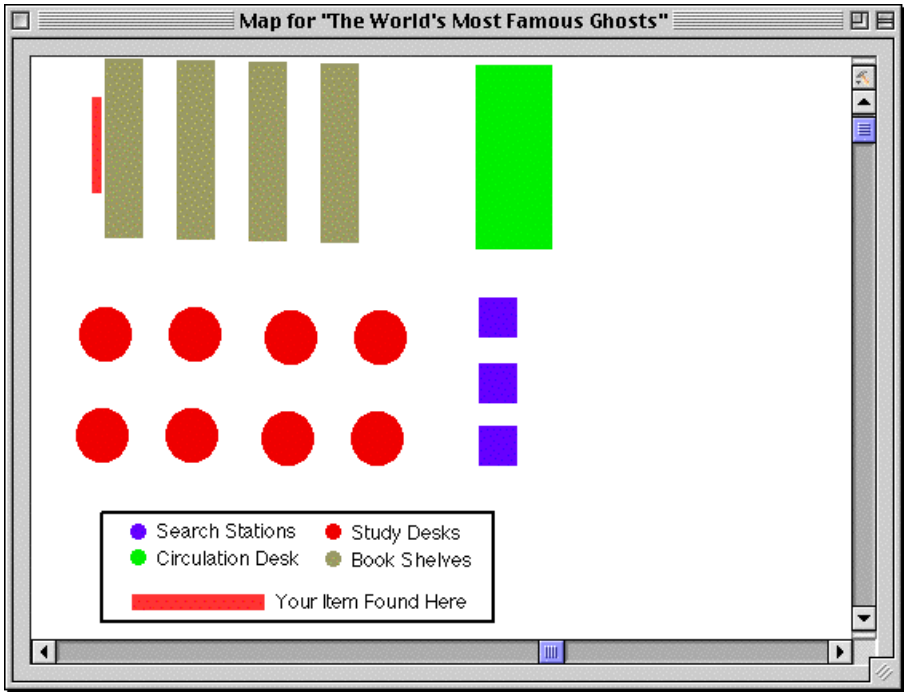
The icon at the top right of the window is used to copy Bulletin Board entries for use outside Alexandria. Click and drag on this icon to move clipping documents to your desktop of the text found in the Bulletin (graphics are not shown in the clipping).

If you double-click on the icon you can save the Bulletin Board entry as an Alexandria Word Processing document complete with text and pictures.

When a user looks at details for an item with a call number in this range, they might see something like this.


Item Details: The World's Most Famous Ghosts
Call Number: 133.1 COH
Author: Cohen, Daniel 1936 1936
Title: The World's Most Famous Ghosts
Publisher: Dodd, Mead: New York, 1978
Medium: Book
Subjects: Ghosts -- Juvenile literature.
Ghosts.
Ghosts.
Extent: 112 p.: ill.; 22 cm.
Content Notes: Includes index.
Notes: Includes index.
Summary: "Presents accounts of well-known ghosts that haunt the White House, the Tower of London, and several other places."
Citation: Cohen, Daniel 1936 1936. The World's Most Famous Ghosts. New York: Dodd, Mead, 1978.
LCCN: 77016857
ISBN: 7701685790
Vol Call # Barcode Status Collection
133.1 COH 3603 Available DEMO Lib. Show Map

Click on the **Show Map** link for the specific copy to see the map as shown below.



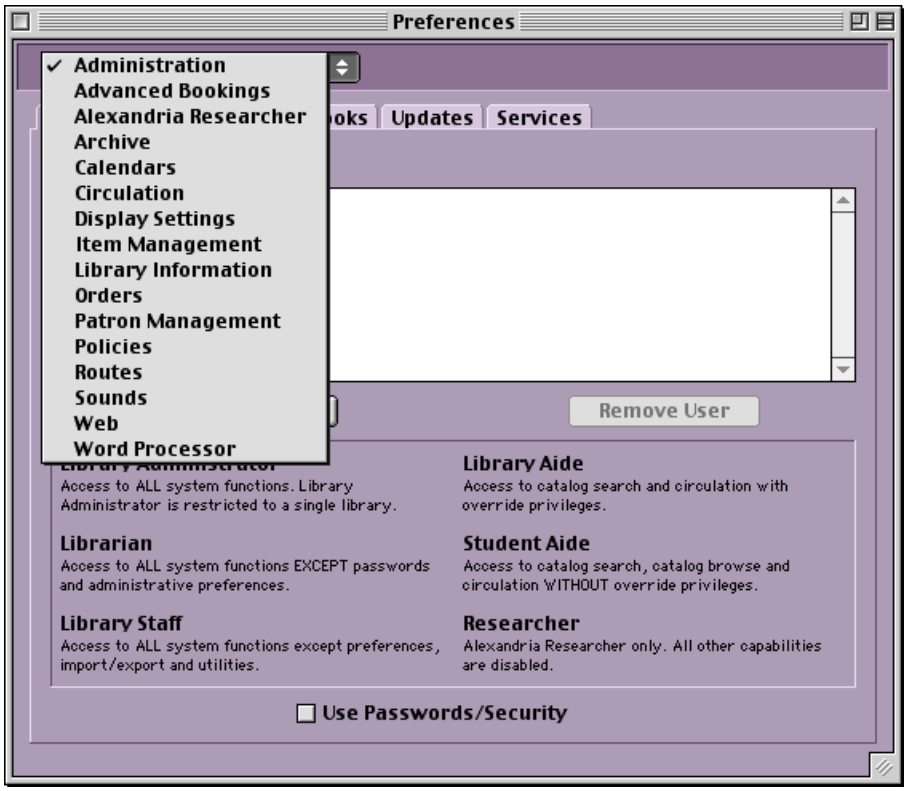
Preferences

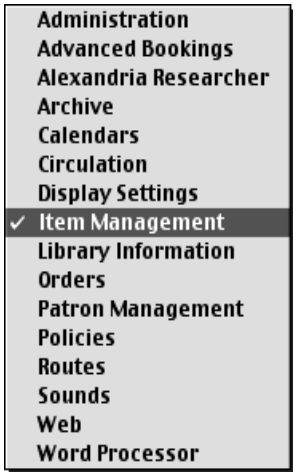
You can use preferences to customize Alexandria to meet the specific needs of your library. For example, you can customize security settings, colors, sounds, determine default values for barcodes and policies, choose settings for cataloging, and set restrictions for the Alexandria Researchers in your library.

With Alexandria preferences you can also configure your library policies (the rules that govern how your library is used). For example, you can set policies to determine how each type of item in your collection circulates and how certain types of patrons can use your library. You can also set policies to determine how long an item can be checked out by a patron, how long a hold request is kept, and so forth.

The following section demonstrates how to set and change librarian workstation preferences. The remaining sections in this chapter describe each preference window and how to use it.

To set librarian workstation preferences, select **Preferences** from the **Edit** menu. The **Preferences** window appears. Click the pull-down menu in the upper left corner of the window to view the list of the preferences.





The following is a summary of Alexandria preferences. The subsequent sections describe each preference in detail.

> **- NOTE -**
>
> Not all preferences are available for every client. The Data Station has more preferences than the Librarian, which has more than the Researcher. Some preferences are only active if you have licensed those features. If you have not licensed the feature, the preference isn't visible.

Administration—Setup users and access levels; activate passwords. Configure Address Books for wide-area or multi-collection access *(see "Administration Preferences" on page 57)*.

Advanced Bookings—Available only for those who have the licensed Advanced Bookings option. Documented in the Advanced Bookings chapter *(see "Settings" on page 196)*.

Alexandria Researcher—Define initial settings for your Alexandria Researchers *(see "Alexandria Researcher Preferences" on page 67)*.

Archive—Alexandria will automatically create a copy of your data at predefined times throughout the week (see "Archive Preferences" on page 72).

Calendars—Setup calendars for use in your library. Calendars are used to schedule open days, closed days, period due dates and notes *(see "Calendar Preferences" on page 71)*.

Circulation—Configure information about temporary barcodes and set how often the Circulation log is saved. Create body text for inclusion in patron notices *(see "Circulation Preferences" on page 73)*.

Display Settings—Choose color schemes for the Alexandria appearance and window settings *(see "Display Settings Preferences" on page 78)*.

Item Management—Configure information about items such as Next Barcode, Barcode Leaders, Default Policy, terminology and various settings for cataloging—including Leading Articles to automatically ignore *(see "Item Management Preferences" on page 80)*.

Library Information—Configure general information about your library *(see "Library Information Preferences" on page 84)*.

Orders—Set defaults for the Orders Management window *(see "Orders Preferences" on page 87)*.

Patron Management—Configure information about patrons such as Next Barcode, Barcode Leaders, Default Policy, and terminology *(see "Patron Management Preferences" on page 89)*.

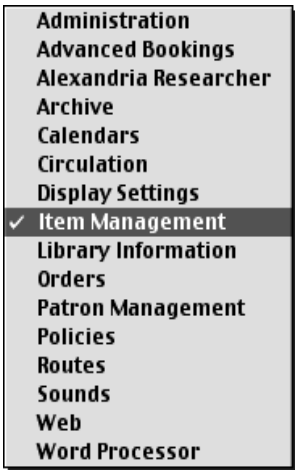
Policies—Set guidelines for library operation *(see "Policies Preferences" on page 91)*.

Routes—Add default settings for your routes *(see "Routes Preferences" on page 99)*.

Sounds—Assign Alexandria sounds for events such as check out, check in and program shutdown *(see "Sounds Preferences" on page 100)*.

Web—Determine settings for Alexandria WEB *(see "Web Preferences" on page 211)*.

Word Processor—Add default settings for new word processor documents *(see "Word Processor Preferences" on page 102)*.



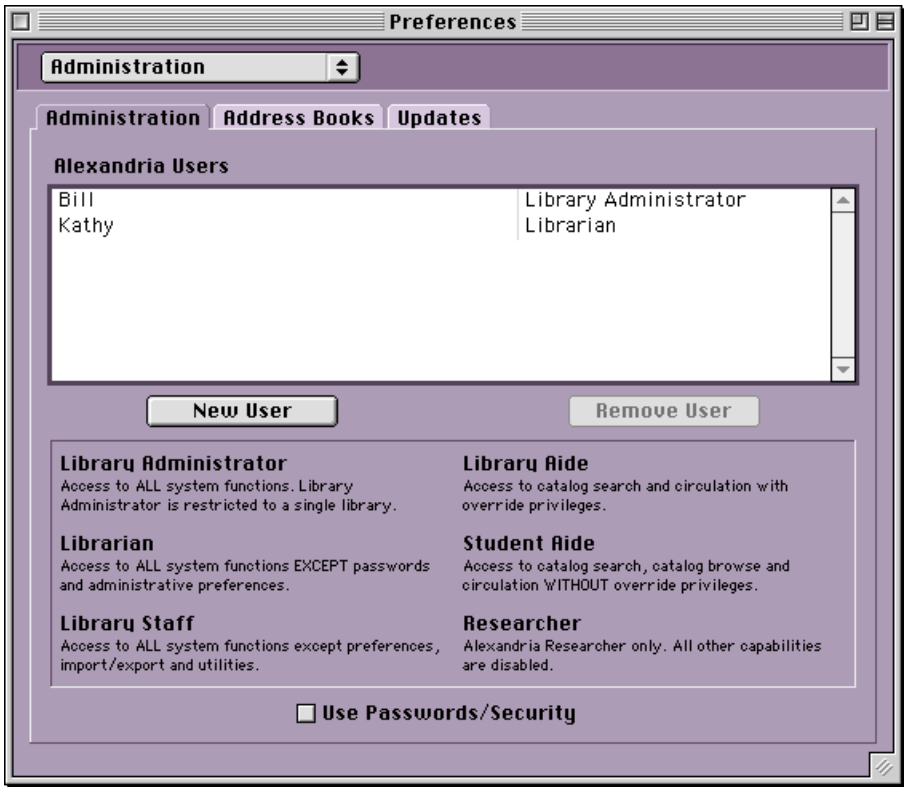
Administration Preferences

Use this preference to assign access levels for users. A user's access level determines what operations the user is allowed to perform.

Many access levels are available from **District Administrator** to **Researcher**. **District Administrator** is the least restrictive and allows unlimited access to Alexandria preferences and settings. **Researcher** is the most restrictive access level, only allowing the ability to search.

Until you setup an Administrator name, Alexandria starts with Administrator access. This is the only access level that lets you setup users. Once you've setup an Administrator name (if no other security level is selected), **Researcher** access is used.

If **Use Passwords/Security** is checked, you may select **Restart** from the **File** menu to register at a different access level.



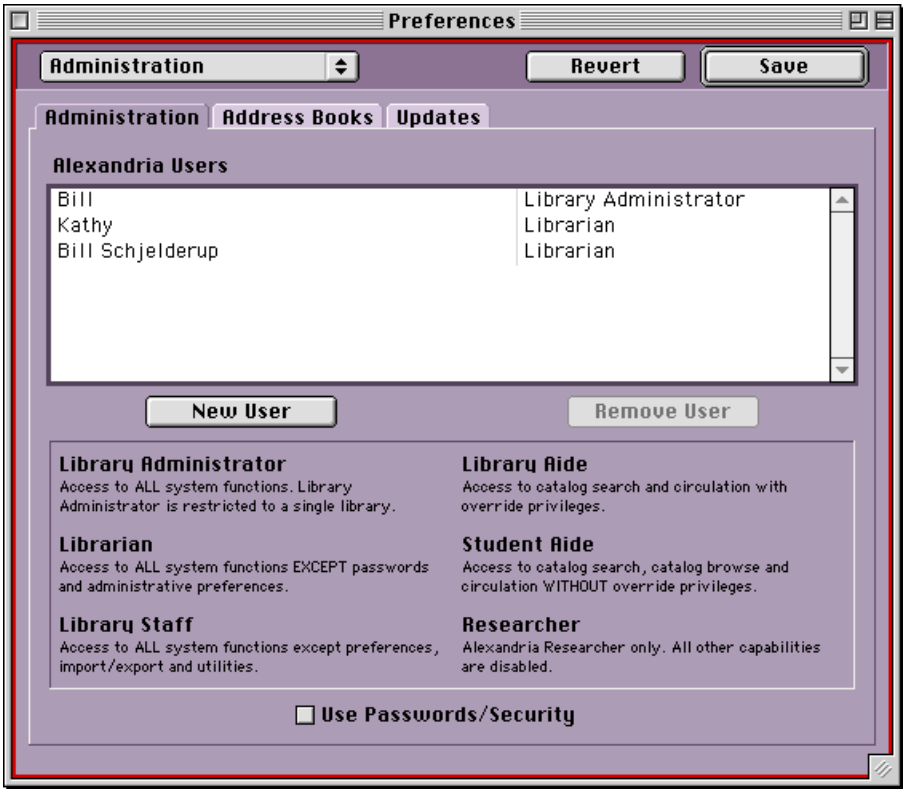
The **New User** and **Remove User** buttons setup and change Alexandria users. To edit user information, double-click on the user's name. You can set any number of user names within each access level. You cannot input duplicate user names.

Adding Users

Click **New User** to add new users to Alexandria. A window will ask you for user information.

Enter the user name and password[1], and then select the access level for the user. If you have not added any users previously, the **Access Level** field is set to **Library Administrator** and you cannot change it. Once you add a Library Administrator, you can add other users with different access levels. The **District Administrator** setting is only meaningful for multi collection licenses (WAN, etc.), for other licenses it acts the same as the **Library Administrator**.

When you click **OK**, the name is displayed on the **Administration** window.



Removing Users

To remove a user from Alexandria, select the user in the list and click **Remove User.**

1. Passwords are NOT case sensitive. Upper and lower case characters match.

Activating Security

Check the **Use Passwords / Security** box on the Administration window to activate the security features of Alexandria. The default setting for new libraries is OFF. When this box is checked and passwords are setup, Alexandria asks for a name and password when starting the system. You should select **Restart** from the **File** menu to activate security.

The user name entered during registration is recorded to the Transaction Log.

Access Levels

The following are the access levels available.

District Administrator—Full access to every control and setting within Alexandria, including the ability to examine and change registered users. For multi-library collection licenses, users at this level can edit district level preferences and have access to all library preferences. All other access levels can only modify records from their assigned library collections.

Library Administrator—Full access to every control and setting within Alexandria, including the ability to examine and change registered users. For multi-library collection licenses, users at this level can only edit preferences for their assigned collection.

Librarian—Full access to every control and setting within Alexandria except the ability to examine registered users and Address Books.

Library Staff—Access to all system functions and reports except Preferences, Import and Utilities.

Library Aide—Access to Alexandria Researcher capabilities and standard Circulation commands, with the authority to allow restricted actions. For example, if a patron has too many books checked out, a warning message appears when the patron tries to check out another book. With this access level, the library aide can override the message and allow the patron to check out another book.

Student Aide—Access to Alexandria Researcher capabilities and standard Circulation commands, but no authority to allow restricted actions. See the above description of Library Aide access for information about restricted actions.

Researcher—Access to **Bulletin Board** and **Search** under the **Show** menu. **Report** menu is disabled. **Preferences** under the **Edit** menu are disabled. **Import** & **Utilities** under the **File** menu are disabled. **Circulation** menu and Circulation window commands are disabled.

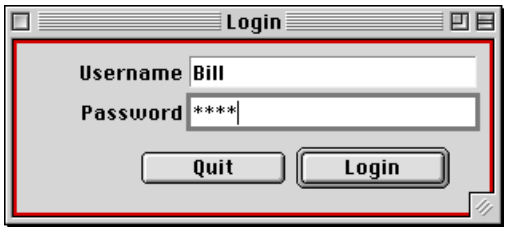
Self Service Check Out—Supports **Researcher** privileges with the addition of check in and bookdrop Circulation commands. There is a shortcut for entering this mode *(see "Set Self-Service" on page 189)*.

Self Service Bookdrop—Supports **Researcher** privileges with the addition of the bookdrop capability—Circulation window allowed in bookdrop mode only. At this level, overdue fines are automatically recorded with no opportunity to accept payment, or forgive/adjust fines. Fines are still displayed in the log. There is a shortcut for entering this mode *(see "Set Self-Service" on page 189)*.

Changing the User Name

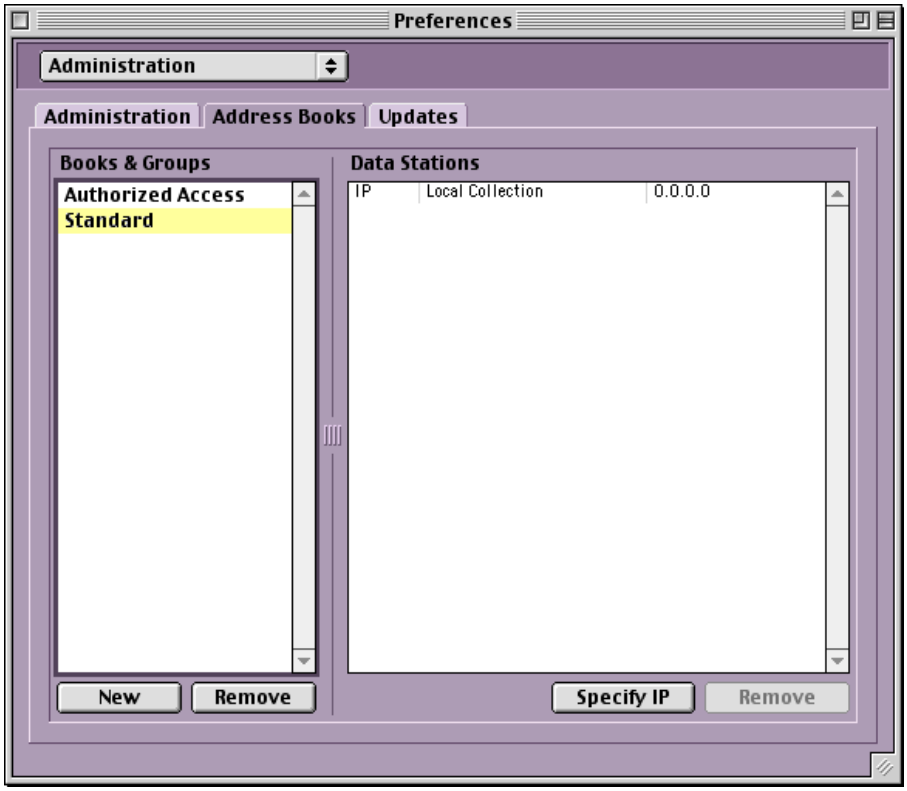
Sometimes you may need to access Alexandria as a different user so you are authorized to perform certain tasks. For example, if you setup the Librarian Workstation for use by a Student Aide, you may need to log in as the Administrator to do a task the student aide does not have authorization to do.

To access Alexandria with a different user name than the one you started the system with, choose **Restart** from the **File** menu. On the pop-up window, enter the user name you want to access Alexandria and then enter the associated password. Click **OK.**



Address Books

Use the following steps to setup Address Books so your workstations can communicate with other Alexandria Data Stations. With the optional wide-area network feature of Alexandria, you can access different library data collections connected through a wide-area network.



- NOTE -

This preference is *only* available on Alexandria Data Stations and District Librarian Workstations! Standard Librarian workstations can not edit the Address Book preferences.

If your Data Station has only one collection, and you are not using a wide-area license, you don't need to setup any Address Books—the defaults are set to the recommended configuration.

> **- NOTE -**
>
> In order to host or use wide-area access, you must purchase a wide-area network license. Once you purchase this license, all your Researcher workstations can search other collections, and authorized workstations from other sites with wide-area network license can search your location.

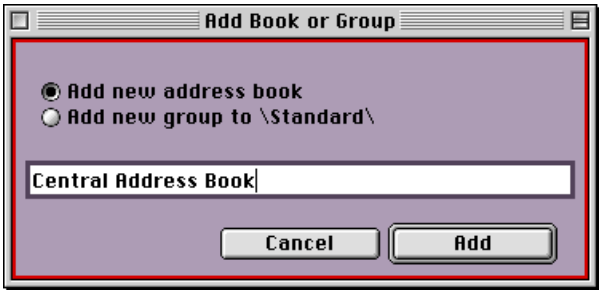
Every Data Station has an Address Book called the **Standard** Address Book. This Address Book contains entries for each library collection in the local database—if there are more than one, a default group that consists of all entries. If you have a multi-library license, this Address Book contains an entry for each library collection. The user may not edit this Address Book.

You can specify which Address Book is to be used as default for your Researcher workstations. At each Researcher workstation, you can further select specific Address Books to be used for that workstation *(see "Address Books" on page 68 for more details*).

In the Researcher, the local collection is always shown at the top of the list followed by groups, then by individual entries. If you don't want an item to be shown, set the "Don't show in Researcher" check-box *(see "Don't Show in Researcher" on page 137 for more details)*.

Adding New Address Books

You may add as many different Address Books as you need to manage your Alexandria collections. Since you can specify which Address Book your Researchers will use, additional Address Books are used for this purpose. Click on the **New** button under the **Books & Groups** list to add a new Address Book.



The local collection is automatically added to this Address Book. You can add additional Data Stations to an Address Book by dragging them from separate Address Books[1] and dropping them onto any other Address Book—or you add them manually, one at a time, using the instructions that follow.

1. When you drag an address from one Address Book to another, the address is always copied. If you want an address removed from an Address Book, use the **Remove** button.

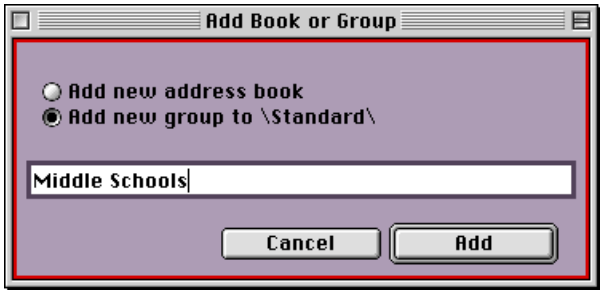
Defining Groups

Using the **Address Books** window, you can create a group of Data Stations and include that group in an Address Book. When a patron chooses a group and then searches for an item, all Data Stations in the group are searched. This makes it easy for patrons to search multiple collections. For example, you could select a group of every high school in the district, or every high school within a certain zip code.

To create a new Group, do the following:

Step 1. Click on an Address Book name.

Step 2. Click on the **New** button and enter the name of the group you want to add.



Step 3. Add Addresses to the group following the instructions that follow.

Adding New Addresses to an Address Book or Group

Step 1. Click on the name of the Address Book or Group where you want to add a new address.

Step 2. Click the **Specify IP** button.

Step 3. Enter an **IP Address** and a **Friendly Name**.

Add IP Address
IP Address 189.209.332.34
Specify a standard internet name (e.g. library.school.edu) or a numeric internet address (e.g. 209.210.71.12).
Friendly Name Central Library
This is the name that will appear in the Data Stations list.
Keep window open after adding.
Cancel
Add

Step 4. If you are going to be adding additional addresses, click on the **Keep window open after adding** check-box.

Step 5. Keep adding addresses to your Address Book as necessary. Click on **Cancel** to close the **Add IP Address** window.

Step 6. Once all Address Book changes have been made, click the **Save** button to save all changes, or **Revert** to undo all changes.

Adding Existing Addresses to an Address Book or Group

If an address has already been entered into an Address Book, you can copy to another Address Book or Group List by dragging it from the **Data Station** and dropping it onto the name of the Address Book/Group List.

Editing a Data Station in an Address Book or Group

Click once on the Address Book, then double-click on the Data Station. Make the changes you desire, then click **Save** to keep the changes or press **Revert** to reset them to default.

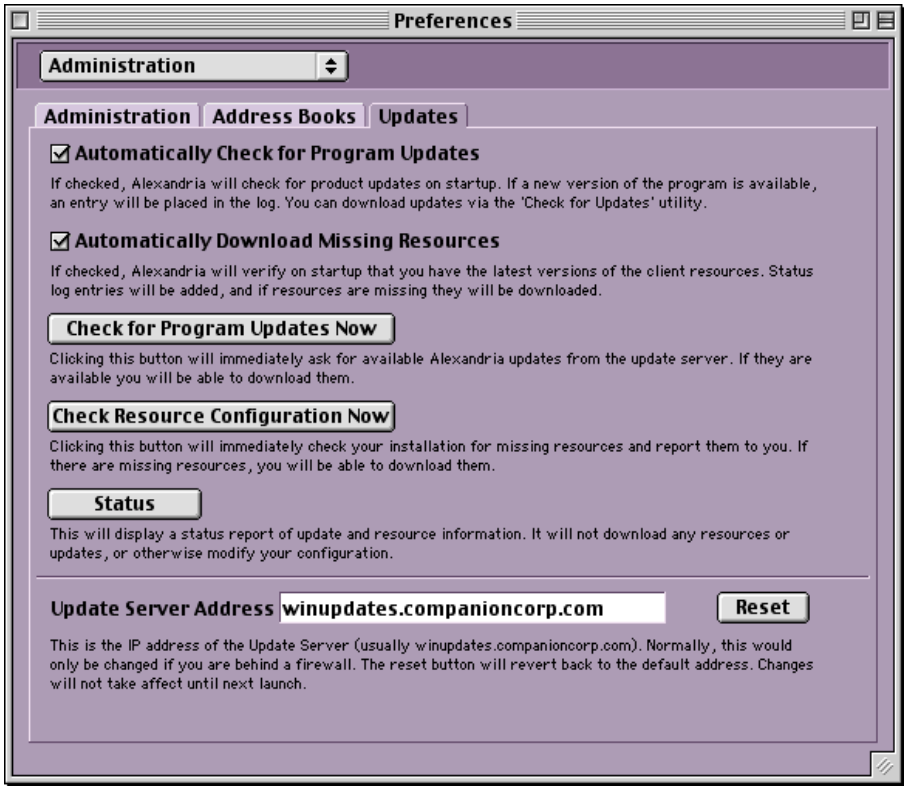
Removing a Data Station from an Address Book or Group

To remove a Data Station from the Address Book and all groups, click once on the Address Book, then click on the Data Station you want to remove. Click **Remove** under the Data Station column. Press **Save** to keep the changes or click **Revert** to restore them to default.

To remove only a Data Station from a group, click once on the group. Click on the Data Station that you want to remove, then click on **Remove** under the Data Stations Column. Click the **Save** button to keep your changes or click on **Revert** to restore them.

Updates

Alexandria can be updated automatically over the Internet. For convenience, large organizations may license the use of an Alexandria Update Server.


Preferences
Administration
Administration
Address Books
Updates
Automatically Check for Program Updates
If checked, Alexandria will check for product updates on startup. If a new version of the program is available, an entry will be placed in the log. You can download updates via the 'Check for Updates' utility.
Automatically Download Missing Resources
If checked, Alexandria will verify on startup that you have the latest versions of the client resources. Status log entries will be added, and if resources are missing they will be downloaded.
Check for Program Updates Now
Clicking this button will immediately ask for available Alexandria updates from the update server. If they are available you will be able to download them.
Check Resource Configuration Now
Clicking this button will immediately check your installation for missing resources and report them to you. If there are missing resources, you will be able to download them.
Status
This will display a status report of update and resource information. It will not download any resources or updates, or otherwise modify your configuration.
Update Server Address
winupdates.companioncorp.com
Reset
This is the IP address of the Update Server (usually winupdates.companioncorp.com). Normally, this would only be changed if you are behind a firewall. The reset button will revert back to the default address. Changes will not take affect until next launch.

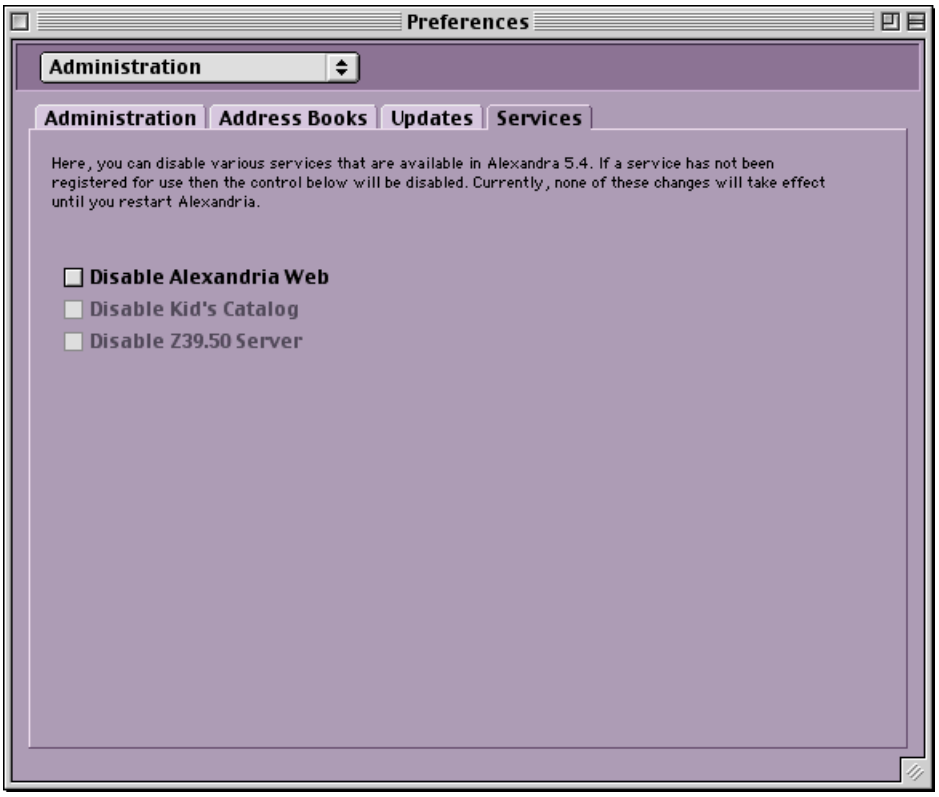
There are two ways you can perform software updates from within Alexandria. If you have an Internet connection, you can check for Alexandria updates from COMPanion's server. If you use **File**, **Utilities**, **Check For Update**, and an update is available, a description of the update is shown under the **Get Read-Me** selection. From there, you can choose to update your Alexandria Data Station or wait for a future date. If you are sure you want to update to the newest version on Alexandria, an easier method is to use the **Updates** tab in the **Administration** window under **Edit**, **Preferences**. This Utility is only available for the Data Station; Librarian Workstations do not offer this selection.

You can also download the newest COMPanion and Alexandria software updates from the official website (`www.goalexandria.com`). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Alexandria registration Name, Email Address, School/Company and Serial Code in order to proceed with the download.

If you don't have an Internet connection or cannot download the newest updates, you can contact COMPanion (via email or tech support) and request an Alexandria Update CD-ROM be sent to your location.

Services

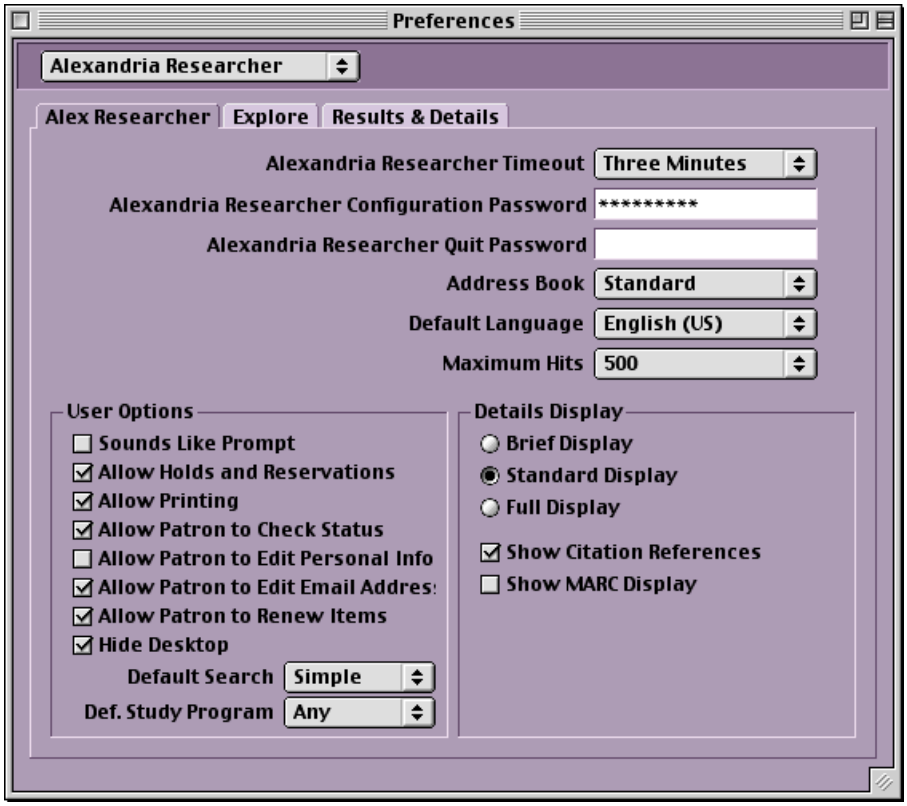
This preference allows the administrator to disable licensed services.


Preferences
Administration
Administration
Address Books
Updates
Services
Here, you can disable various services that are available in Alexandra 5.4. If a service has not been registered for use then the control below will be disabled. Currently, none of these changes will take effect until you restart Alexandria.
Disable Alexandria Web
Disable Kid's Catalog
Disable Z39.50 Server

Only the services which you've licensed can be enabled (or disabled). If they are not licensed, they will appear grayed-out. Changes will not take effect until Alexandria restarts. Default is to enable all licensed services.

Alexandria Researcher Preferences

Use this preference to select the default settings for Alexandria Researcher.



Unless overwritten by a specific Researcher workstation, these preferences will be used for every Researcher workstation. If you change these settings on a specific Researcher workstation, those settings are changed for that workstation ONLY.

Alexandria Researcher Timeout—You can select the number of minutes the Alexandria Researcher remains inactive before resetting. If a patron abandons the workstation, the screen will contain his/her work until the time (set in the preferences) resets the screen to its initial state. The default setting is **Three Minutes**.

Thirty seconds before resetting, a window will appear, allowing the patron to cancel the reset. If the patron fails to respond, the reset will occur as scheduled. If the patron cancels the reset, the timer is started again.

If you do not wish the Alexandria Researcher to reset when idle, select **Never** from the pull-down menu.

Alexandria Researcher Configuration Password—Enter a password in this field to restrict patrons' access to preferences on Alexandria Researchers. If no password is entered, Alexandria Researcher security can be configured on a workstation-by-workstation basis. If you set a password in this field and a patron selects **Preferences** from the **Edit** menu on an Alexandria Researcher, a pop-up window appears, asking the patron to enter this password. If the user does not know this password, the user cannot change the preferences on the Alexandria Researcher. The default password is `"Configure"`.

Alexandria Researcher Quit Password—Enter a password in this field to restrict patrons from quitting Alexandria Researcher. If you set a password in this field and the patron chooses **Quit** from the **Edit** menu on an Alexandria Researcher, a pop-up window appears, asking the patron to enter this password. There is no default password, thus allowing all users to quit.

Address Book—This pull-down menu lets you select the Address Book which will be used for this workstation. The default entry is the **Standard** Address Book.

Default Language—This setting allows you to set the language used when the workstation starts up or is reset. The default is set by your activation code; in the USA it's set to **English**.

Maximum Hits—Specifies the maximum number of titles to return during a search. Default is 500.

User Options—These settings determine what a user can do from an Alexandria Researcher.

Sounds Like Prompt—Select this option to display a reminder message if a search finds no matches. The message reminds the patron about the Sounds-Like search, which sometimes finds matches when other searches do not. The default setting is OFF.

Click **OK** to start a Sounds-Like search or **Not Now** to return to the search window. The **OK** button is the default.

Allow Holds and Reservations—Select this option to allow patrons to place hold requests or make reservations from Alexandria Researchers. Users have to enter their barcode and password to place the hold or reservation. The default setting is ON.

Allow Printing—Select this option to allow patrons to print from Alexandria Researchers. Generally, you'll allow printing for patrons outside the library and then customize workstations within the library to disable printing. The default setting is ON.

Allow Patron to Check Status—This option allows patrons to check their status from Alexandria Researchers. The patron status report includes information such as items checked out, on hold, and reserved. If this setting is enabled, patrons will be able to change their own password. The default setting is ON.

Allow Patron to Edit Personal Info—Select this option to allow patrons to modify their address and phone number. The default setting is ON.

Allow Patron to Edit Email Address—Select this option to allow patrons to modify their Email address. The default setting is ON.

Allow Patron to Renew Items—Select this option to allow patrons to renew items they have checked out. The default setting is ON.

Hide Desktop—Select this option to hide the desktop on Alexandria Researchers. This keeps users from accessing other applications on the desktop. The default setting is ON.

Search Style—This option selects the default search pane. This is the interface that patrons will see when performing a catalog search. The default setting is **Simple**.

Details Display—These settings determine the level of standard details displayed for a search on an Alexandria Researcher. Each setting includes more detail than the previous setting. You can select one of three display types, and also select to show citation references and Marc records.

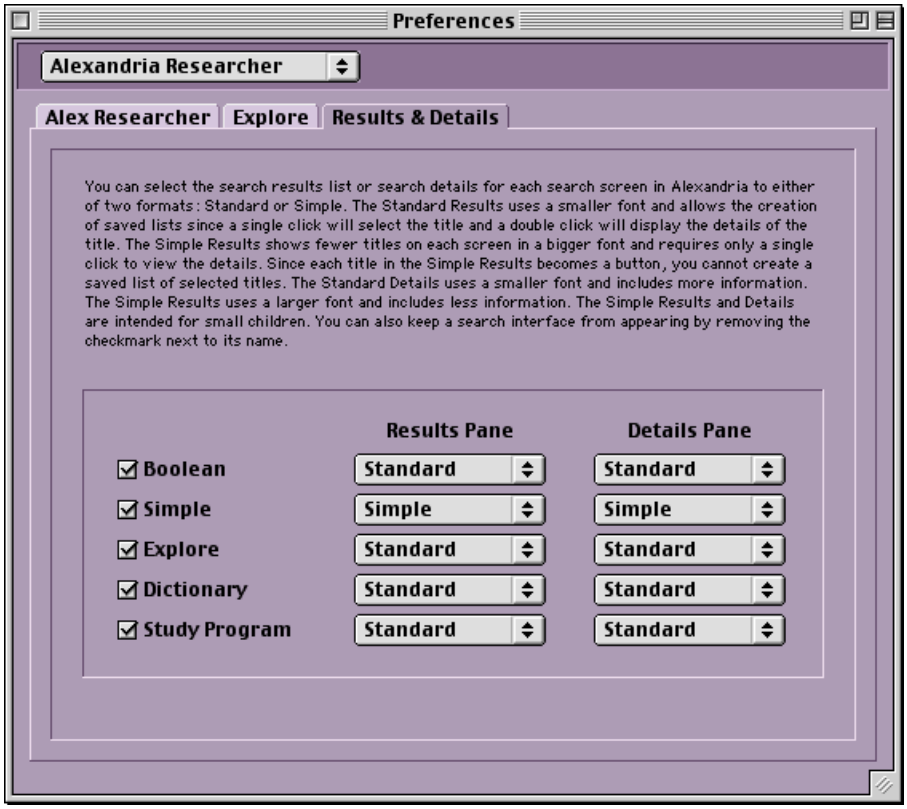
Brief Display—Shows only minimal title information.

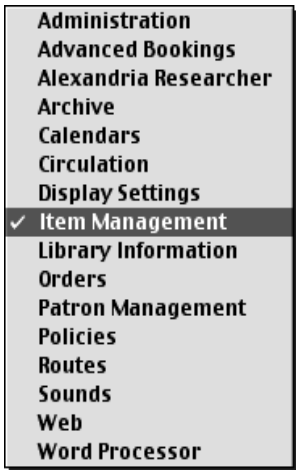
Standard Display—Shows all useful title information. Default setting.

Full Display—Shows all title information, which is more than most want to see.

Show Citation References—Shows citation references for creating quick bibliographies. Default is ON.

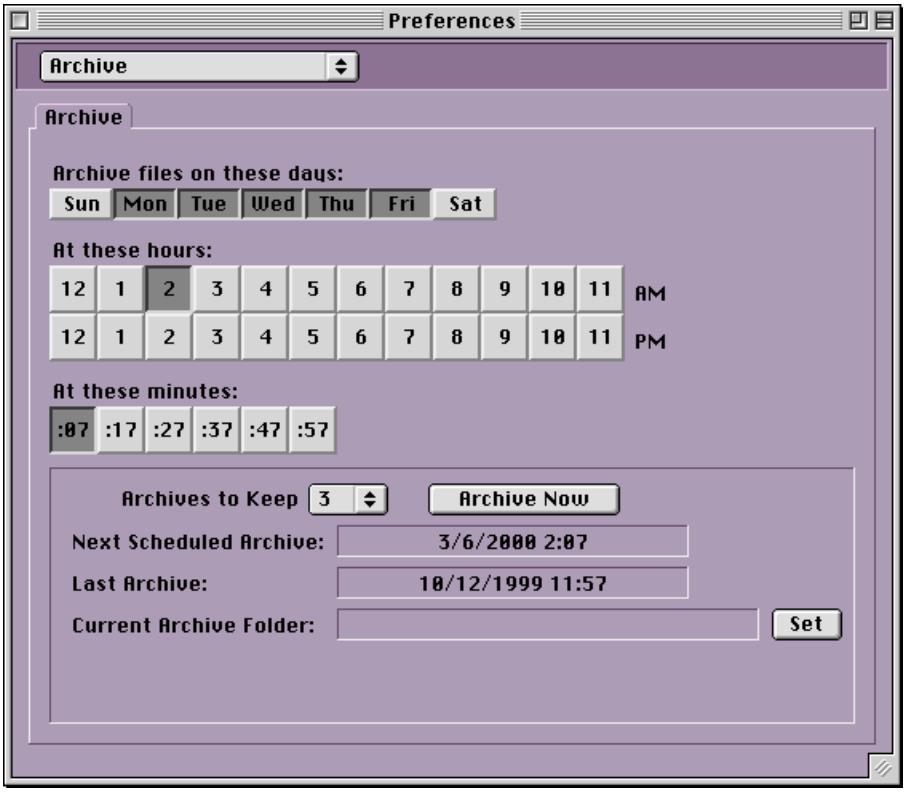
Show Marc Display—Shows a hyperlink to the title's Marc record. Default is OFF.


Preferences
Alexandria Researcher
Alex Researcher
Explore
Results & Details
You can select the search results list or search details for each search screen in Alexandria to either of two formats: Standard or Simple. The Standard Results uses a smaller font and allows the creation of saved lists since a single click will select the title and a double click will display the details of the title. The Simple Results shows fewer titles on each screen in a bigger font and requires only a single click to view the details. Since each title in the Simple Results becomes a button, you cannot create a saved list of selected titles. The Standard Details uses a smaller font and includes more information. The Simple Results uses a larger font and includes less information. The Simple Results and Details are intended for small children. You can also keep a search interface from appearing by removing the checkmark next to its name.
Results Pane
Details Pane
Boolean
Standard
Standard
Simple
Simple
Simple
Explore
Standard
Standard
Dictionary
Standard
Standard
Study Program
Standard
Standard



Archive Preferences

The Archive window allows you to schedule automatic backup copies of your valuable Alexandria Data. The default settings are **Mon**, **Tue**, **Wed**, **Thu** & **Fri** at **11PM** at "**:47"** minutes after the hour. This default keeps **3** inside the **Archive** folder, located under the **Alexandria v5 folder**.

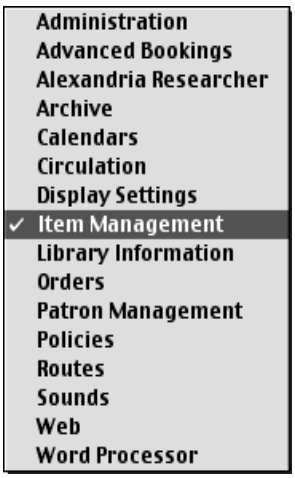

Preferences
Archive
Archive
Archive files on these days:
Sun Mon Tue Wed Thu Fri Sat
At these hours:
12 1 2 3 4 5 6 7 8 9 10 11 AM
12 1 2 3 4 5 6 7 8 9 10 11 PM
At these minutes:
:07 :17 :27 :37 :47 :57
Archives to Keep 3
Archive Now
Next Scheduled Archive: 3/6/2000 2:07
Last Archive: 10/12/1999 11:57
Current Archive Folder:
Set

When it's time for an archive, all data in the **Alexandria Data** folder is copied to a folder in the archive folder. During archiving, library services on the Data Station are disabled.

Although you can disable the automatic archiving function, this is not recommended. Your most recent archives, combined with your off site backup, are invaluable in securing the safety of your very valuable data.

- NOTE -

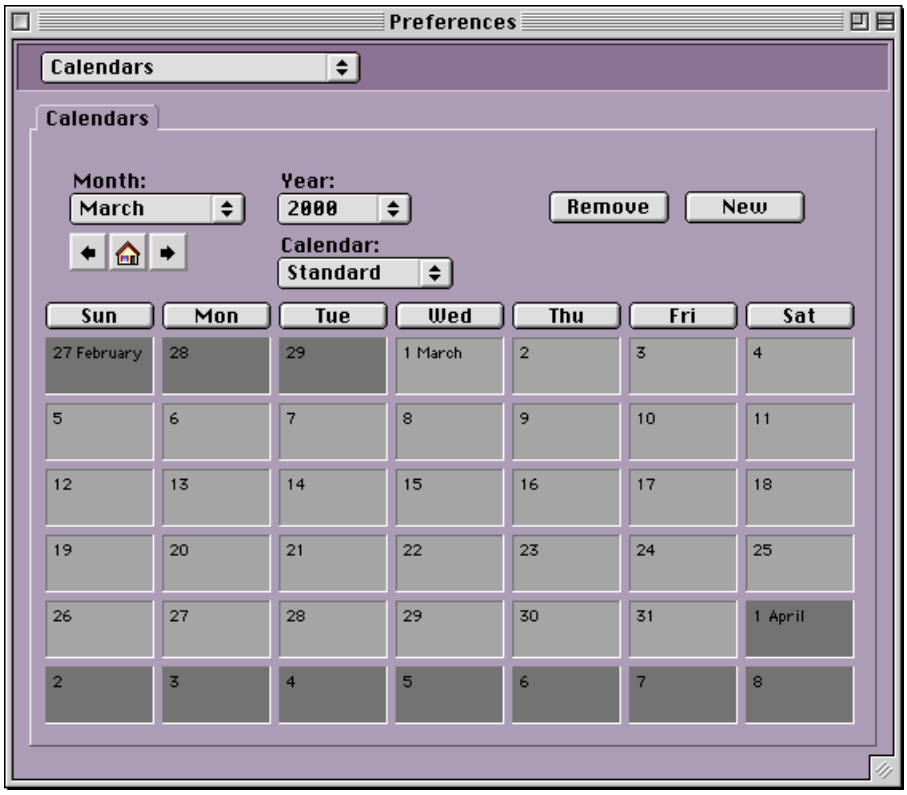
The Data Station must be turned on and running when you have the Archive scheduled to take place. Thus, if a librarian doesn't want to leave the computer running overnight, they should change the default time that the program is set to archive.



Calendar Preferences

Use this preference to create custom calendars for your library.

You can assign a separate calendar to each patron or Circulation policy. This lets you use different calendars for different groups of patrons who may be operating on different school levels or schedules.



The month and year of the current calendar are shown in the two fields directly under the Calendars tab. To change the month or year, use the pull-down menu. You can also use commands to change the month or year. Press <command-) > to go forward a month and <command-(> to go back a month.

Alexandria includes a calendar for the current year, one previous year, and three years in the future.

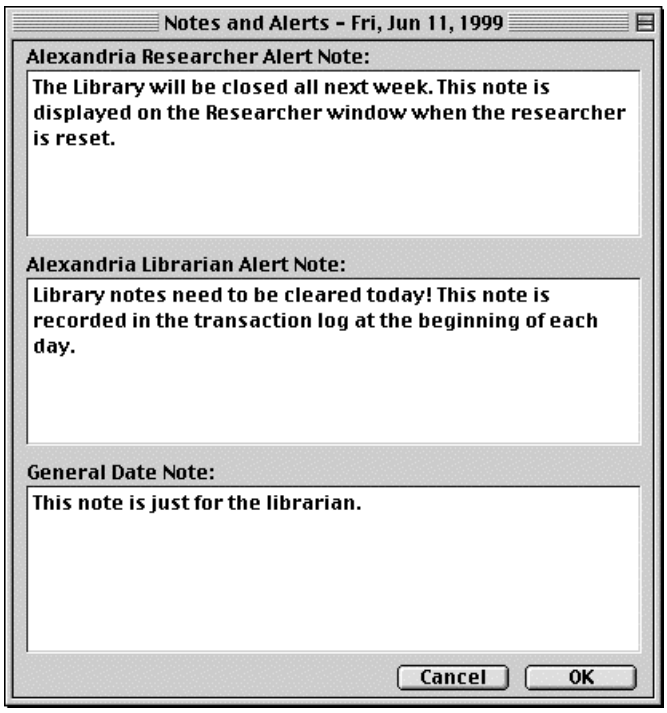
You can mark days on the calendar as **Period Due** dates and as **Closed** dates by clicking on the actual day. The choices cycle from **Open** (nothing displayed), **Closed**, **Period Due**, and then back to **Open**.

Period Due—A period due date is the last day an item is due if you set the Circulation policy to apply period due dates. For example, if you set a period due date of September 30, 1997, all books checked out before September 30th (that normally would have had a due date AFTER the 30th), will be assigned a due date of September 30th.

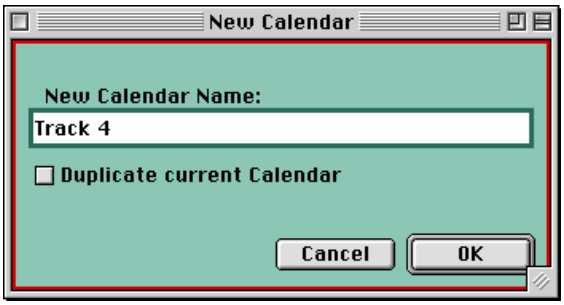
Closed—These are dates on which the library is closed. Due Dates are computed so that they never fall on Closed Dates, only on **Open** or **Period Due** dates.

You can change the settings for the same day each week for the month by clicking on the day-button at the top of the calendar. You can change the setting for all days for the future year by holding the <alt>|<option> key down and clicking on the day-button at the top of the calendar.

<Option-click> (or use the <alt> key with Windows) on a date to add a note. Notes can be used to display automatic reminders for both Librarians and Researchers, as well as provide private notes for the librarian. Alert notes are only active for the **Standard** Calendar and are ignored on other calendars. General Notes are available for all calendars.

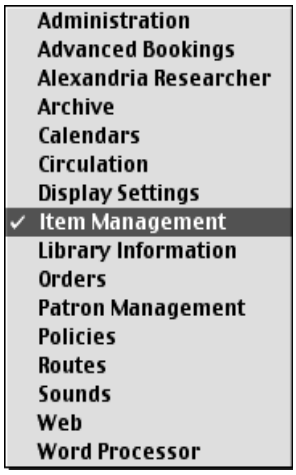

Notes and Alerts - Fri, Jun 11, 1999
Alexandria Researcher Alert Note:
The Library will be closed all next week. This note is displayed on the Researcher window when the researcher is reset.
Alexandria Librarian Alert Note:
Library notes need to be cleared today! This note is recorded in the transaction log at the beginning of each day.
General Date Note:
This note is just for the librarian.
Cancel
OK

Changes to the calendar are saved when you leave the calendar preference window. You can also use the **Save** and **Revert** commands in the **File** menu to save or ignore changes. To create a new calendar, click the **New** button. Enter a name for the calendar you want to add.



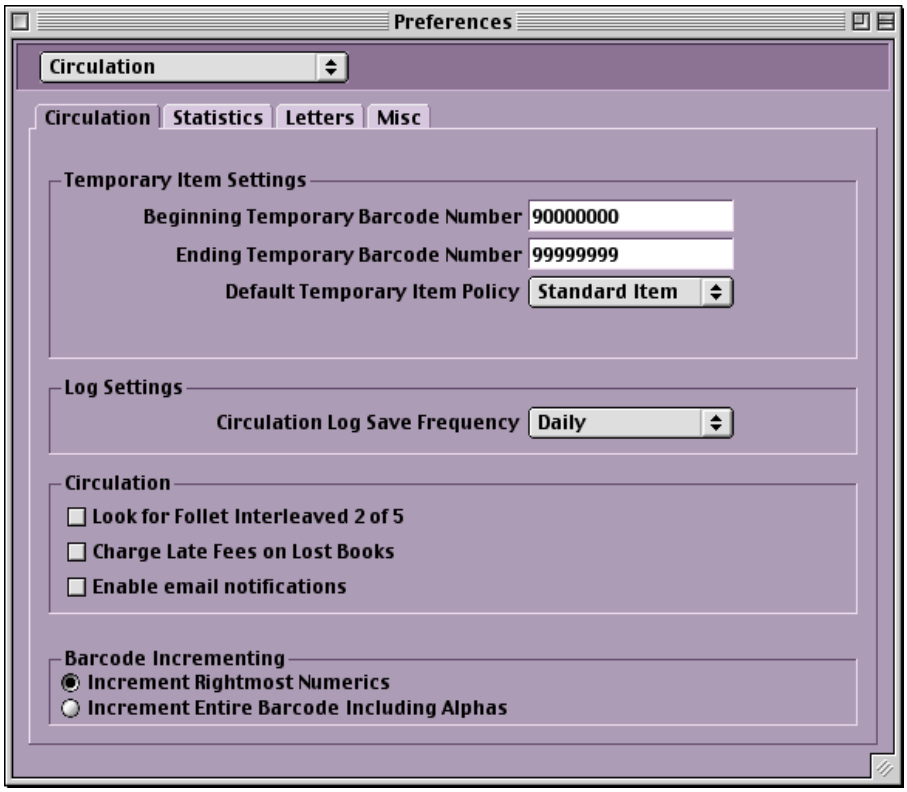
If you want to duplicate an existing calendar as a template for a new one, click the **Duplicate Current Calendar** check-box.

To delete a calendar, make it the current calendar and click the **Remove** button. Any policy using the deleted calendar is assigned to the standard calendar. You cannot delete the standard calendar.



Circulation Preferences

Use this screen to set preferences relating to Circulation.



Circulation

Beginning Temporary Barcode Number, Ending Temporary Barcode Number—Enter the first and last numbers of the barcode range you have dedicated to temporary items. If you enter a barcode in this range, Alexandria will treat it as a temporary item (if it hasn't already been assigned to a patron or item). Default range is `90000000` through `99999999`

Default Temporary Item Policy—This pull-down menu lets you select the policy used for temporary circulation items. Default is **Standard Item**.

Circulation Log Save Frequency—Select **Daily**, **Weekly**, **Monthly** or **Never**. Archived logs are placed in the **Log** folder. Default is **Weekly**.

The Librarian Workstation also creates an **Log** folder, where archived logs are saved. The Circulation log contains everything displayed on the Circulation window, and additional special notes which may be useful. The Circulation log contains a history of everything that has occurred on that workstation. It can be a valuable document if you want to examine a workstation's history.

The following choices are available.

Daily—The Circulation Log resets at the beginning of each day and is placed in the **Log** folder with a name such as **Circ Log for day yyyymmdd** (for example, **Circ Log for day 19990730**).

Weekly—The Circulation Log is reset every week (a week starts on Monday) and is placed in the **Log** folder with a name such as **Circ Log for week yyyymmdd** (for example, **Circ Log for week 19990729**).

Monthly—The Circulation Log is reset at the beginning of every month and is placed in the **Log** folder with a name such as **Circ Log for month yyyymm** (for example, **Cir Log for month 199907**).

Never—The Circulation Log is saved, but never archived. Under this option, the Circulation log can grow to be very large.

Look for Follett Interleaved 2 of 5—If you have any items with Follett interleaved 2-of-5 labels, check this box. This setting looks for all barcodes that are exactly 10 digits long and removes the last three digits which Follett uses as check digits. Default is `OFF`.

Charge Late Fees on Lost Books—If this option is `ON`, then late fees continue to accumulate on lost books up to the max fee limit. To stop charging fees on a particular item, **Remove** the copy or assign it as **Discarded**. Default is `OFF`.

Enable Email notifications—Check this box if you want Alexandria to automatically send Email confirmations and notices to patrons. If selected, Alexandria will send Email to patrons with valid Email addresses when the following events occur: Hold placed, Hold expires, In-Stock Hold available, In-Stock Hold expires, Item became overdue, and Recall issued. Default is `OFF`.

Repair Trailing Alpha Check Digit—If this is box is checked, items that *would* match a scanned barcode if they had the exact same trailing alpha check digit are repaired so that their barcodes match exactly.

Repair Trailing Numeric Check Digit—This is the same as above, only for numeric check digits.

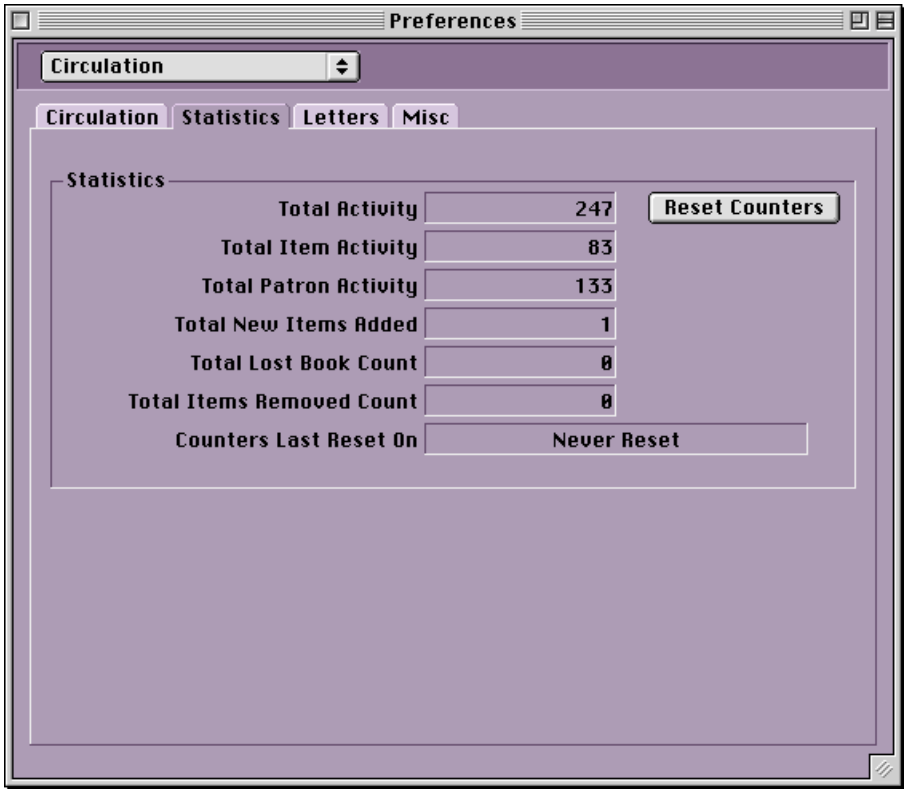
Barcode Incrementing

Increment Rightmost Numerics—When this option is selected, incremented barcodes only modify the rightmost numeric digits. This is the default setting.

OR

Increment Entire Barcode Including Alphas—When this option is selected, incremented barcodes modify both numeric and alpha characters.

Statistics



Alexandria keeps a number of general statistics for your library. These counters can be reset any time. Most libraries will reset these on a yearly basis. Counters are incremented as follows.

Total Activity—Increments with every command (failed or successful) entered into the command line of the Circulation window.

Total Item Activity—Incremented every time a new Item is made Current on the Circulation window.

Total Patron Activity—Incremented every time a new Patron is made Current on the Circulation window.

Total New Items Added—Incremented every time a new Item Copy is added through the Items window or by import.

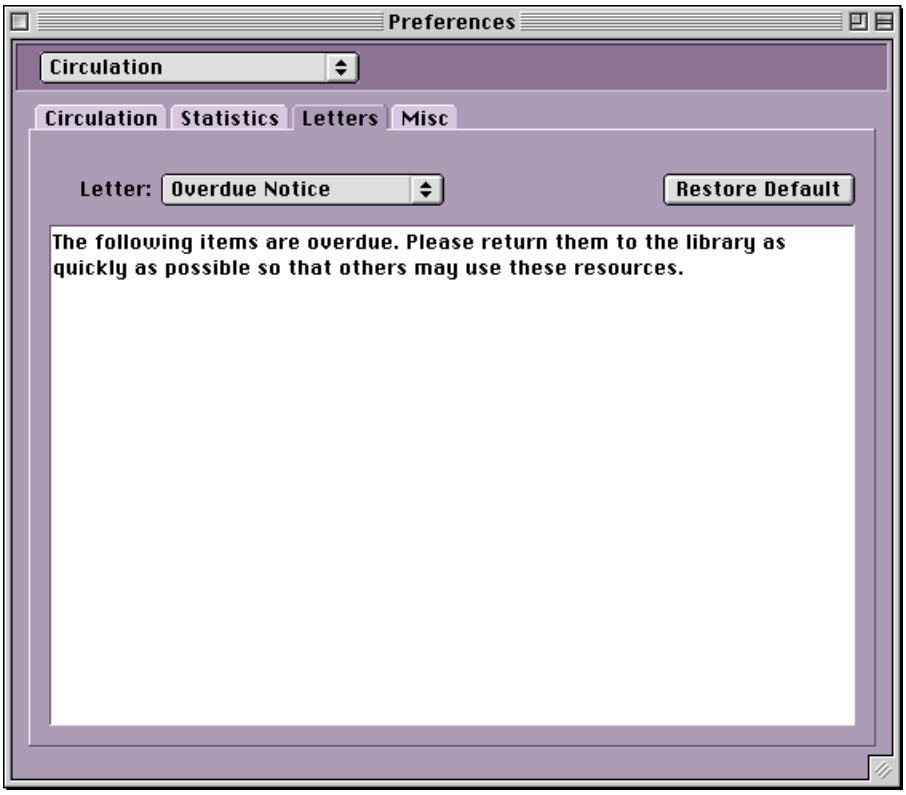
Total Lost Book Count—Incremented every time a copy is checked out to the Lost Patron.

Total Items Removed Count—Incremented every time a copy is removed from the database.

Counters Last Reset On—The date the counters were last reset to zero.

Letters

Use this window to customize the body text of letters (in patron notices) sent from the library.



Use the **Restore Default** button to restore your text with the default text. Default text is as follows:

Overdue Notice—"The following items are overdue. Please return them to the library as quickly as possible so that others may use these resources."

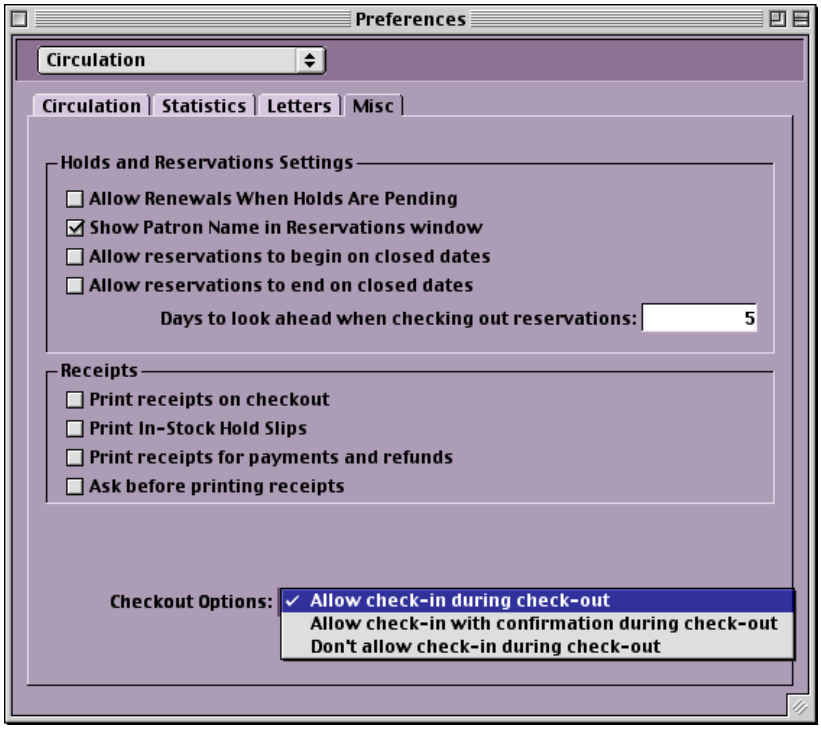
In-Stock Hold—"An In-Stock item is being held for you. Please pick it up by the specified date or it will be returned to general circulation."

Recall—"The following item is required at the library. Please return it as quickly as possible."

Reservation Notice—"Please note that you have a reservation on the following items. Reservations should be picked up in the morning of the reservation start date and returned by the evening of the due date."

Misc

Additional Circulation preferences.



Allow Renewals When Holds Are Pending—When **ON**, this option allows users to renew books which have hold requests pending.

Show Patron Name in Reservations window—When **OFF**, patron barcode is displayed in the reservations window. When **ON**, the patrons last name is shown in the reservations window.

Allow reservations to begin on closed dates—When **ON**, this option allows users to place reservations that begin on closed dates.

Allow reservations to end on closed dates—When **ON**, this option allows users to place reservations that end on closed dates.

Days to look ahead when checking out reservations—This sets the number of calendar days that Alexandria looks ahead for reservations when items are checked in. During check in, if a reservation is detected within this time period, Alexandria displays a notice for the user. The `GG` and `GPP` Circulation commands also take this date into account before checking reservation items out to Patrons. Default is `5` days.

Print receipts on check out—When **ON**, Alexandria will automatically print a receipt (similar to the Current Item **Details** button) for every item that is checked out. When **OFF**, receipts can be printed manually using the `"D"` or `"QP"` command in the Circulation window at the end of a transaction.

Print In-Stock Hold Slips—When **ON**, Alexandria will print a receipt when an item becomes an In-Stock Hold.

Print receipts for payments and refunds—When **ON**, Alexandria will print receipts for payments and refunds.

Ask before printing receipts—When this box is checked, Alexandria will prompt you before printing out any receipts.

Check Out Options

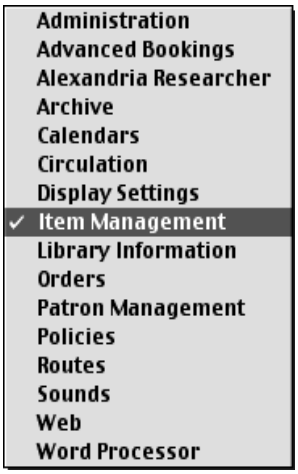
This pull-down menu is a new feature to Alexandria. It allows librarians to limit the capabilities of the Check In/Out Circulation mode.

These three options are:

Allow check in during check out—If Alexandria is in check out mode, this option allows items to be checked in to the Circulation window as well.

Allow check in with confirmation during check out—If you try to check in items while the Circulation window is in check out mode, Alexandria will prompt you for permission before checking-in an item.

Don't allow check in during check out—This will not allow items to be checked in from the Circulation check out window. For example, your library may require separate Data Stations, some that only allow items to be checked in and others that only check out.



Display Settings Preferences

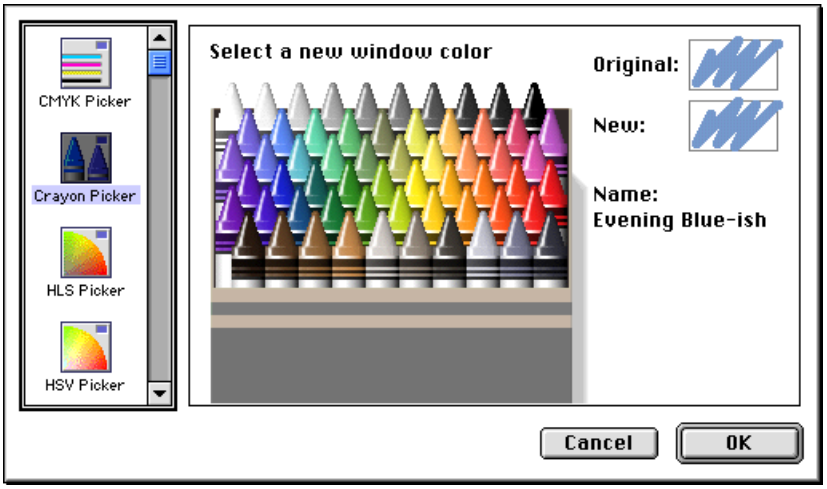
NOTE:

After you leave the Display Settings preference window, the color scheme you select is applied to new windows as you open them.

If you already have Alexandria windows open when you set this preference, those windows will not show the new color scheme until you close them and re-open them.

The Circulation window will change when Alexandria is restarted.

To customize a color setting, double-click the line that you want to change. The standard operating system color window displays.



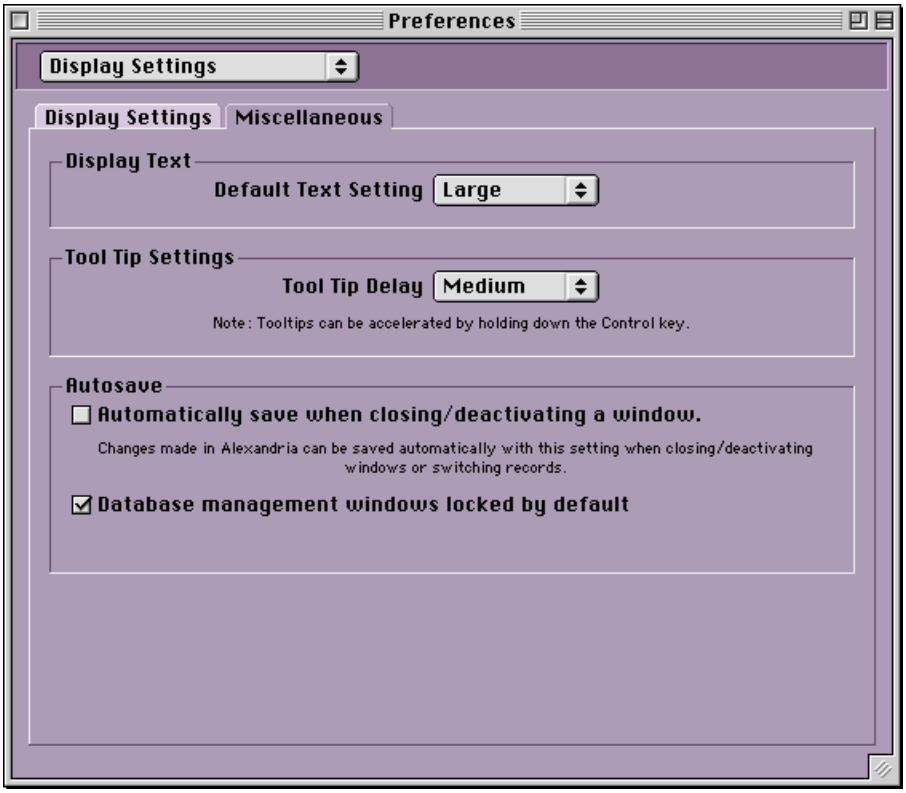
Customize the color as you choose, then click **OK**.

Click the **Set Defaults** button beside **Pre-Defined Color Scheme** to set the selected color scheme as a default pull-down menu selection. Now, you can further customize these settings. The Default color scheme is **General**.

Color schemes are local for each workstation. When a workstation is first launched, it will use the Library Preferences from the Data Station. Any future changes to that workstation are applied solely for that workstation.

Miscellaneous Display Settings

Use these controls to further customize the look of your Alexandria program.


Preferences
Display Settings
Display Settings
Miscellaneous
Display Text
Default Text Setting
Large
Tool Tip Settings
Tool Tip Delay
Medium
Note: Tooltips can be accelerated by holding down the Control key.
Autosave
Automatically save when closing/deactivating a window.
Changes made in Alexandria can be saved automatically with this setting when closing/deactivating windows or switching records.
Database management windows locked by default

Default Text Setting—Selects the general size of displayed text. Default is **Large**.

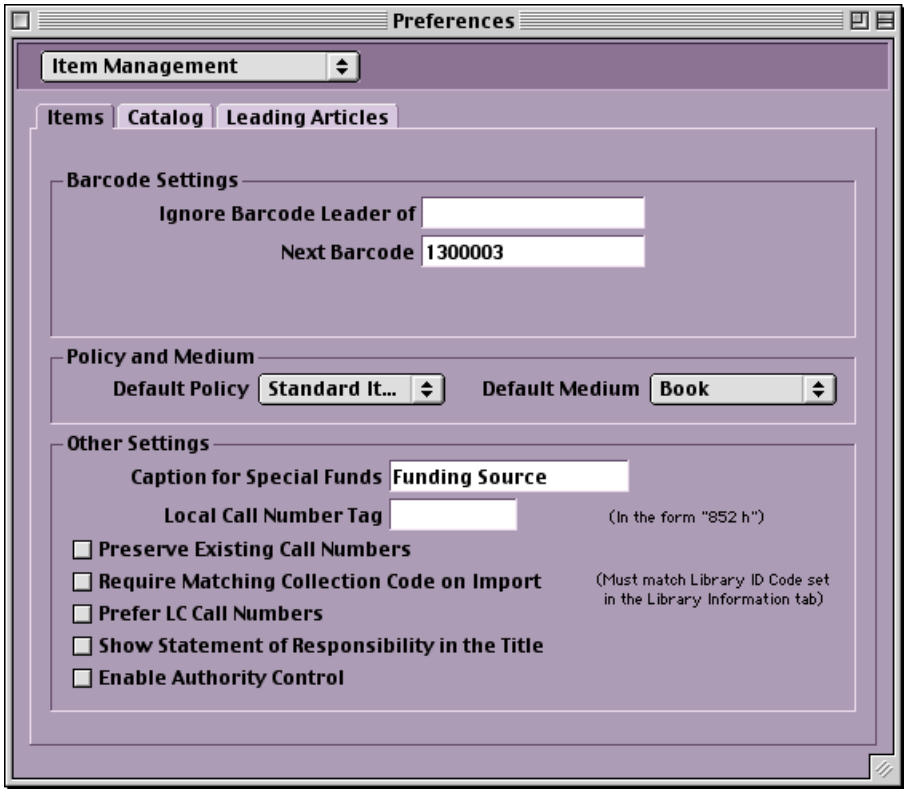
Tool Tip Delay—Selects delay time for tool tips (those short pieces of descriptive text that appear when you move your mouse cursor over buttons and such). Default is **Medium**.

Automatically Save...— When this box is checked, Alexandria automatically performs the **Save** operation, rather than asking for user confirmation. Default is OFF.

Database management windows locked by default— When this box is checked, the user must unlock the current record in order to begin making changes. A locked record can **not** be modified. Default is ON.

Item Management Preferences

Use this preference to configure general information about Next Barcode, Default Policy, and other settings for catalog settings.



Ignore Barcode Leader—If you are using barcode numbers not designed for Alexandria, you can specify leading characters to be automatically ignored by Alexandria. For example, your item barcodes may have the text "ITM" in front of each barcode, enter "ITM" here. Alexandria will ignore the "ITM" at the beginning of the barcode label. If you don't need this feature, leave the field blank.

Next Barcode—The next available item barcode number. When you enter a new copy record, Alexandria automatically assigns the next available barcode (unless you assign a number manually). You should set this field when you first configure Alexandria, so any copies added are assigned an item barcode number that coincides with your numbering strategy. Default is "1300000".

Unused Barcodes—Runs a list of all unused barcodes in the range you select. Barcode range cannot exceed "100,000".

Default Policy—Using this pull-down menu, you can set the default policy for newly added item records. The default is **Standard**. If you assign an item policy which is later removed, the **Default Policy** will return to **Standard**.

Default Medium—Using this pull-down menu, you can set the default Medium for newly added item records. Default is **Book**.

Caption for Special Funds—This preference allows you to customize the terms used for the Funds field. Because you can change the term, this manual uses the generic term "Funds." Use this field to keep track of where funding for an item came from. For example, if you have to report the status of items purchased with government grants or special funds, enter the grant number or special fund name in this field. You can then generate reports using this field. Default setting is **Funding Source**.

Local Call Number Tag—If your Call Numbers are not in the customary location within the Marc record, use this preference to configure where Alexandria should check first for a call number.

If you enter a valid "Tag_subfield," Alexandria will scan that point in the Marc record to find the call number. If your call numbers are typically at **900a**, enter "`900a`" in this field. The default setting is blank.

Preserve Existing Call Numbers—When this check-box is set, existing call numbers are never modified during import or automatic SmartMARC updating. Default is **ON**.

Require Matching Library Code on Import—When this box is checked, only copy information with your library code in **852_a** is imported. All other library codes are ignored. Default is **OFF**.

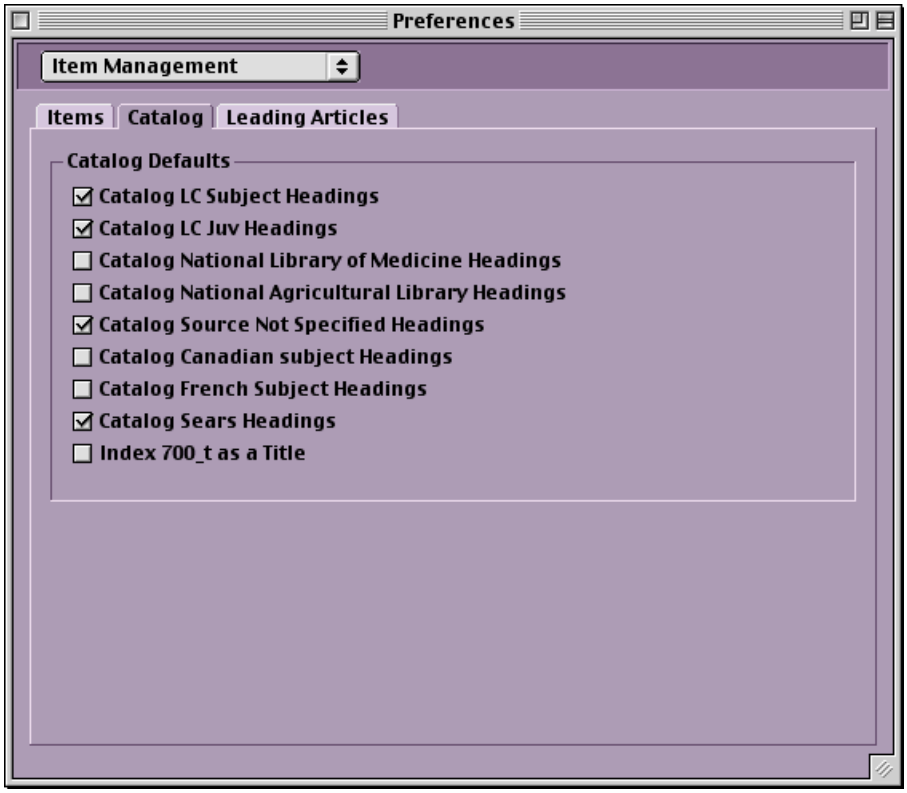
Some districts keep a central union catalog with all district holdings. When these records are transferred to an individual library, each title may contain holding information for each library in the district. This option allows each library to import holding records which belong to that library. Other holding records are automatically removed from the Marc record before it's saved.

Prefer LC Call Numbers—When this check-box is set, Alexandria looks first for an LC Call Number when looking for call numbers in an imported Marc record. Default is **OFF**.

Show Statement of Responsibility in the Title—When this box is checked, Alexandria shows the Statement of Responsibility **245_c** in the Title field of the Item Management window. Default is **OFF**.

Enable Authority Control—When this check-box is set, Alexandria forces Authority Control when adding or editing item records *(see "Authority Control" on page 126 for more information)*. Default is **OFF**.

Cataloging—This portion of the window sets the rules for cataloging items.



These options tell Alexandria which subject headings you want cataloged. Since cataloging only occurs during importing or modification of records, your changes will only be reflected in new records unless you rebuild your database.

Catalog LC Subject Headings—Default is **ON**.

Catalog LC Juv Headings—Default is **ON**.

Catalog National Library of Medicine Headings—Default is **OFF**.

Catalog National Agricultural Library Headings—Default is **OFF**.

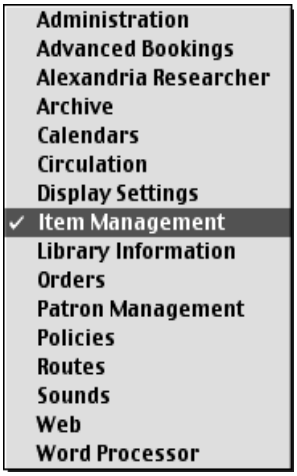
Catalog Source not Specified Headings—Default is **ON**.

Catalog Canadian subject Headings—Default is **OFF**.

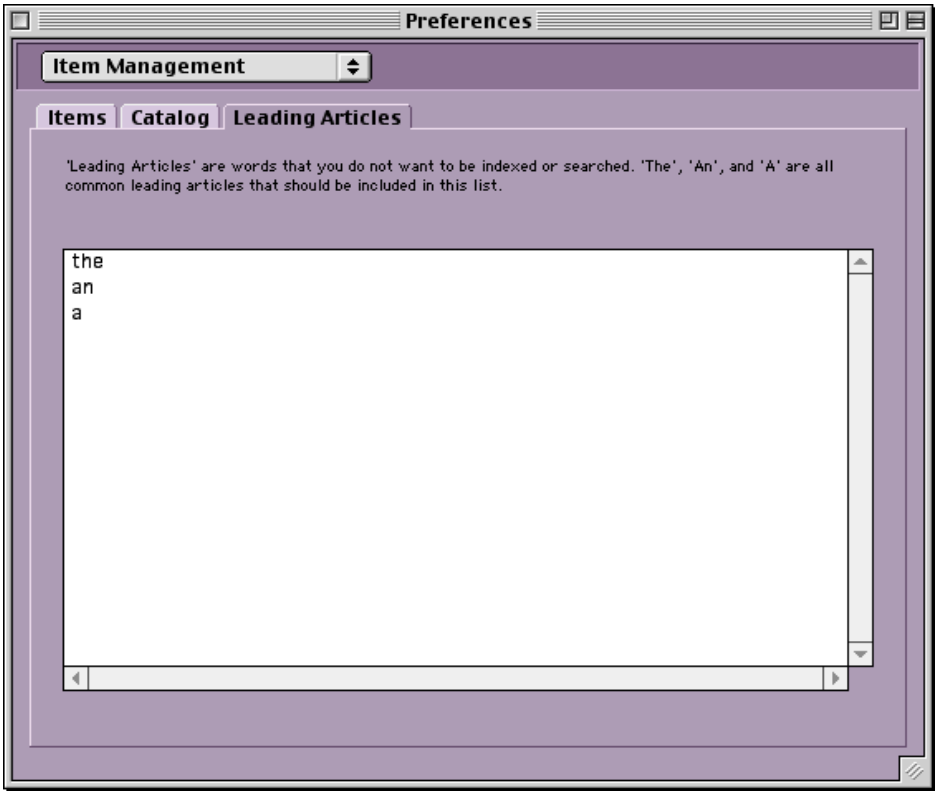
Catalog French Subject Headings—Default is **OFF**.

Catalog Sears Headings—Default is **ON**.

Index 700_t as a Title—Default is **OFF**.

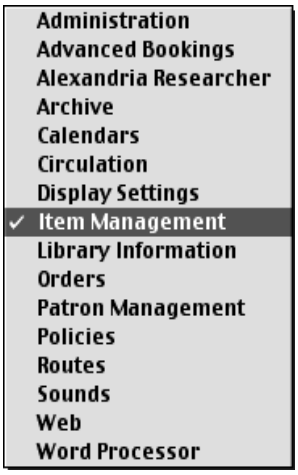


Leading Articles—This preference allows the administrator to specify which leading articles are to be ignored for cataloging and searching purposes. Since leading articles vary from language to language, this preference gives the librarian total control of how they are defined.


Preferences
Item Management
Items
Catalog
Leading Articles
'Leading Articles' are words that you do not want to be indexed or searched. 'The', 'An', and 'A' are all common leading articles that should be included in this list.
the
an
a

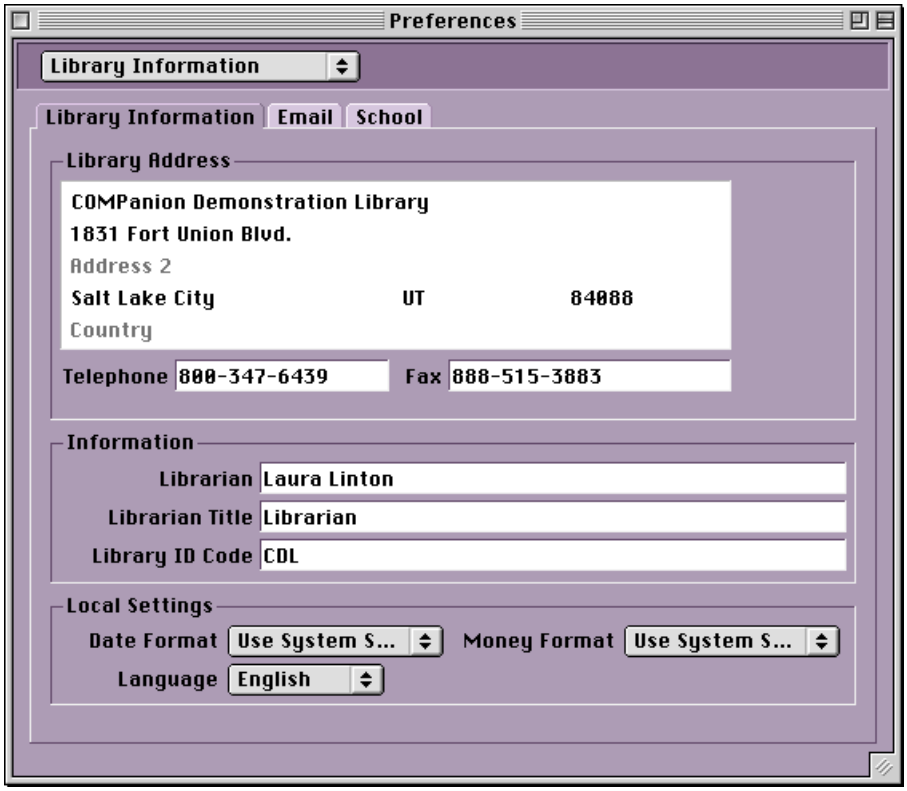
Where is this preference used?

- Titles beginning with these words will be sorted by the next word. The second indicator of the **245** tag is automatically set to the correct Marc standard value for the skipped leading article.
- Series beginning with these words are sorted by the next word. The second indicator of the **440** tag is automatically set to the correct Marc standard value for the skipped leading article.
- When searching for titles, queries beginning with leading articles will automatically skip the term. Thus, the query "The Cat in the Hat" will actually search for "Cat in the Hat."
- When searching for a series, queries beginning with leading articles will automatically skip the term. Thus, the query "The Wizard of Oz" will actually search for "Wizard of Oz."



Library Information Preferences

Use this preference to personalize Alexandria with information about your library.



Library Name—Enter the name of your library. The default is your library license name.

Address, **City**, **State**, **Postal Code**, **Country**, **Telephone** and **Fax—**This data is used for return addresses on Patron Notices and for information shown on Alexandria WEB.

Librarian—This is the name that appears at the bottom of form letters. Enter the librarian's name here. Default is **Librarian**.

Librarian Title—The librarian's title. For example, Librarian, Director of Media or Library Specialist, can also be included on form letters. Default is blank.

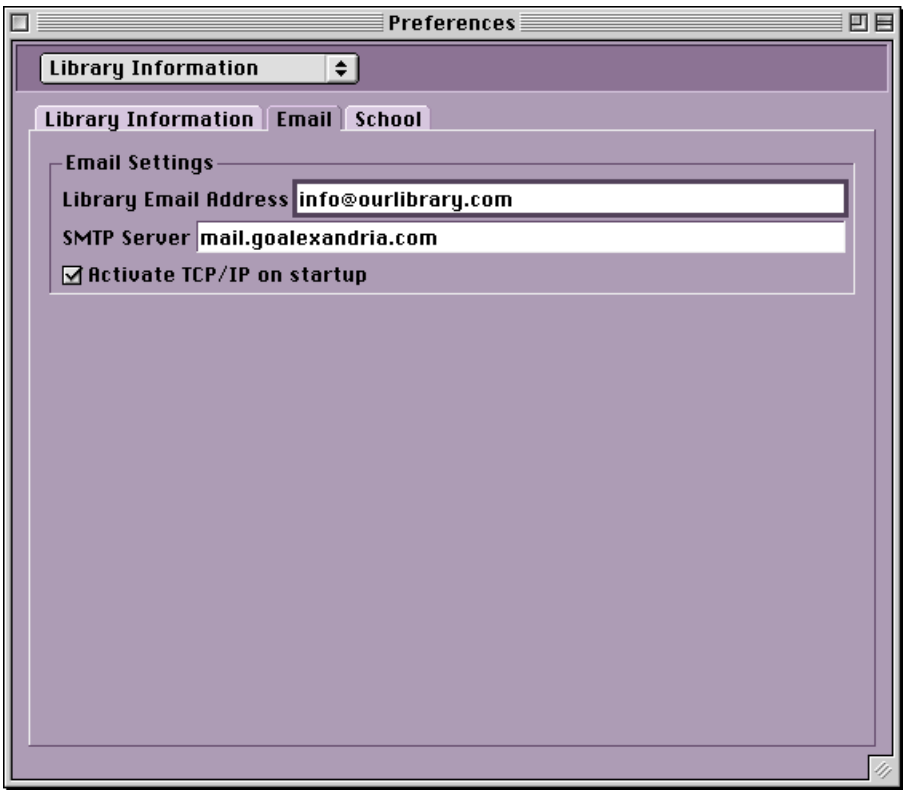
Library ID Code—This is the library location identification code. This is a short code that is used for the Marc location code at **852_a** in the Copy Collection field. Default is the first four characters of your Library Name. If you change this value, all matching copy records are automatically updated to the new value.

Date Format—Select the date format you want Alexandria to use. Default is **Use System Setting**.

Money Format—Select the money format you want Alexandria to use. Default is **Use System Setting**.

Language—Select a default language from the list of available languages. Default is **English** unless otherwise set by activation codes.

Email

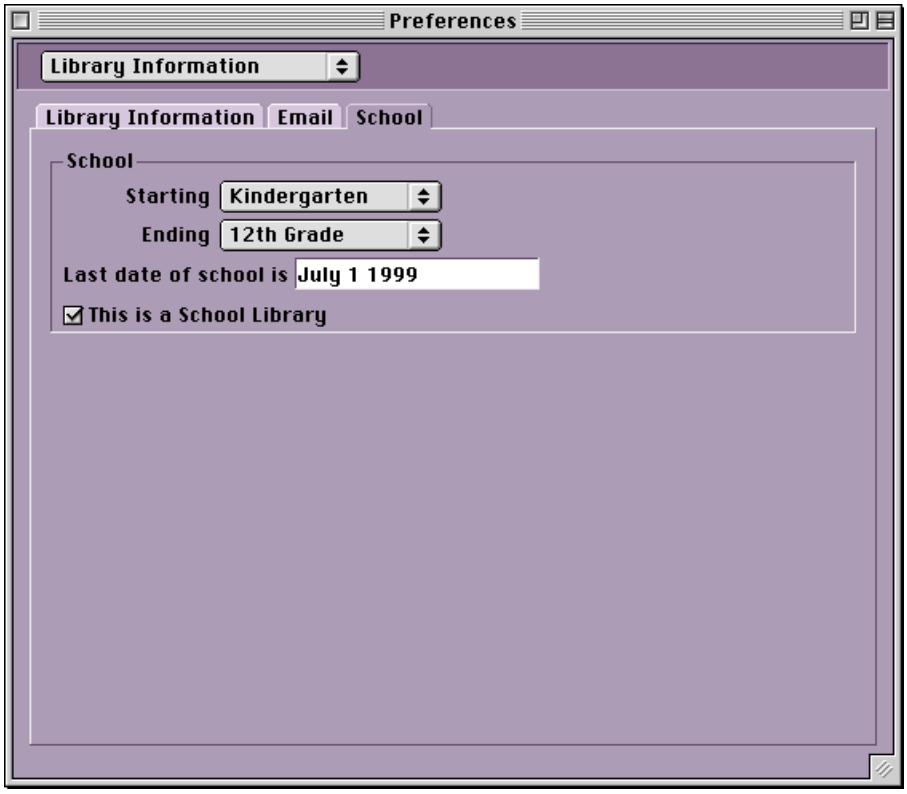


Library Email Address—This is the library's Email address, which is used as the return mail address for overdue notices and other Email messages sent by Alexandria. You must enter an Email address to use most Email services. Default is blank.

SMTP Server—This is the TCP/IP or DNS address of your library's mail server. Typically, this will be "`mail.`" followed by your domain name. You must enter a valid SMTP Server address to use Email services. Default is blank.

Activate TCP/IP on startup—When this setting is `OFF`, Alexandria will not activate TCP/IP. This prevents Alexandria from activating PPP connections when running without clients. If you are using TCP/IP for communications, this setting should be set to `ON`. Default is `OFF`.

School



Starting—Use the pull-down menu to select the starting grade level of your school. Default is **Kindergarten**.

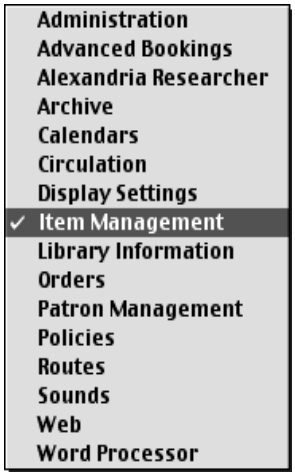
Ending—Use the pull-down menu to select the ending grade of your school. Default is **12th Grade**.

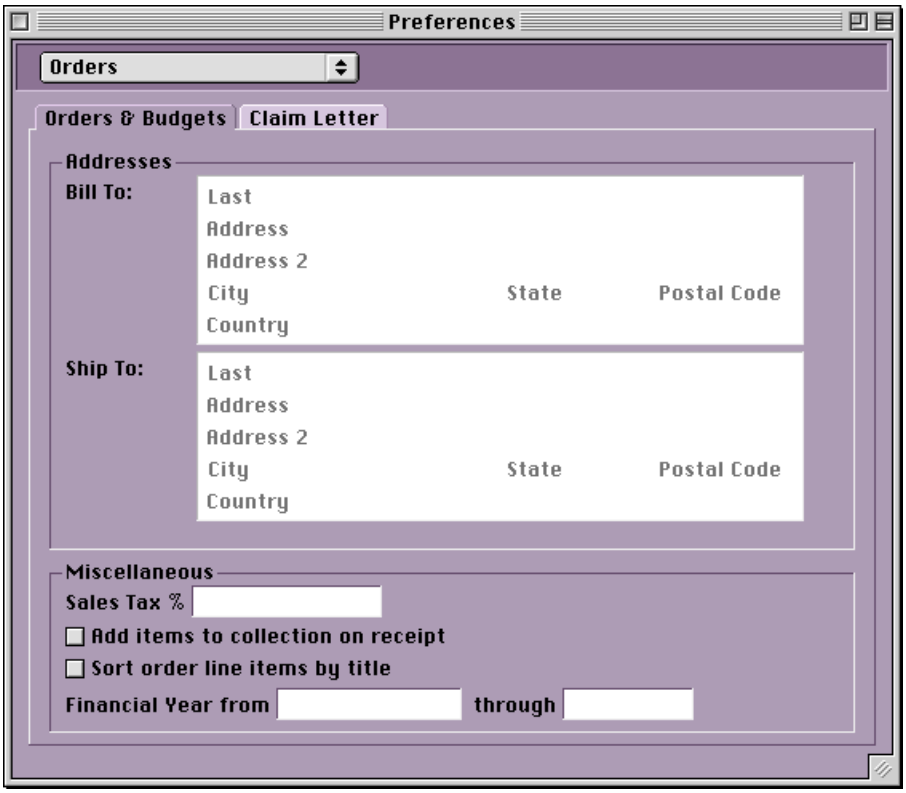
Last Date of School is—Identifies the last date of the current school year. On this date, all patrons graduate to the next grade level. Default is July 1st of the current year.

This is a School Library—When this box is checked, Alexandria uses defaults and settings which assume school library settings. Turning this option off either hides school elements or changes them into non-school related terms. Default is set based upon your activation codes. If your activation code contains "H1," it will default to ON.

Orders Preferences

Use to set preferences for the Orders management window.





Bill To—Enter the **Bill To** address for your orders. If you fail to enter an address, when you print an order, the library address will be used.

Ship To—Enter the **Ship To** address for your orders. If you fail to enter an address, when you print an order, the library address will be used.

Sales Tax%—Enter the default sales tax rate for your orders. Default is 0%.

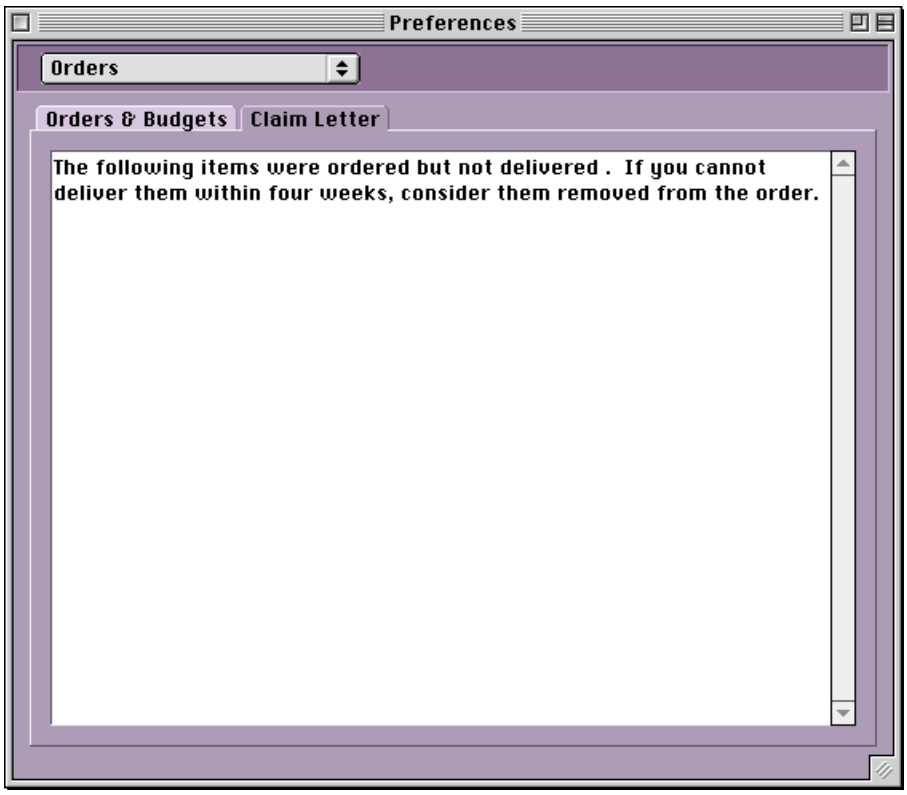
Add items to Collection on Receipt—Use this preference to set the default value for new orders. Default is `OFF`. If you typically receive Marc records from your Vendor for import when your items are received you will want to leave this setting `OFF`.

Sort Order Line Items by Title—Use this preference to set the default sorting order of line items. Select ON to sort by Title. Select `OFF` to sort in the order items that were added. Default is `OFF`.

Financial Year from—Use this preference to set the financial period for your budget. Budgets are computed only for the current financial period. Default is blank. A blank financial period includes all dates.

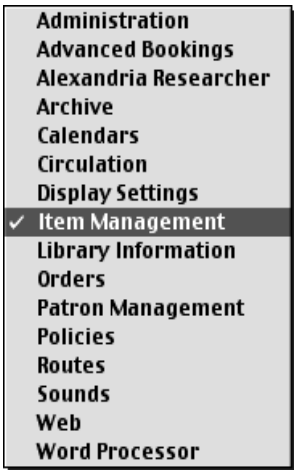
The Financial Year is also used for computing Lost and Discarded items in the standard Super Summary. Only items Lost or Discarded within this financial year are counted on the Super Summary.

Claim Letter


Preferences
Orders
Orders & Budgets
Claim Letter
The following items were ordered but not delivered . If you cannot deliver them within four weeks, consider them removed from the order.

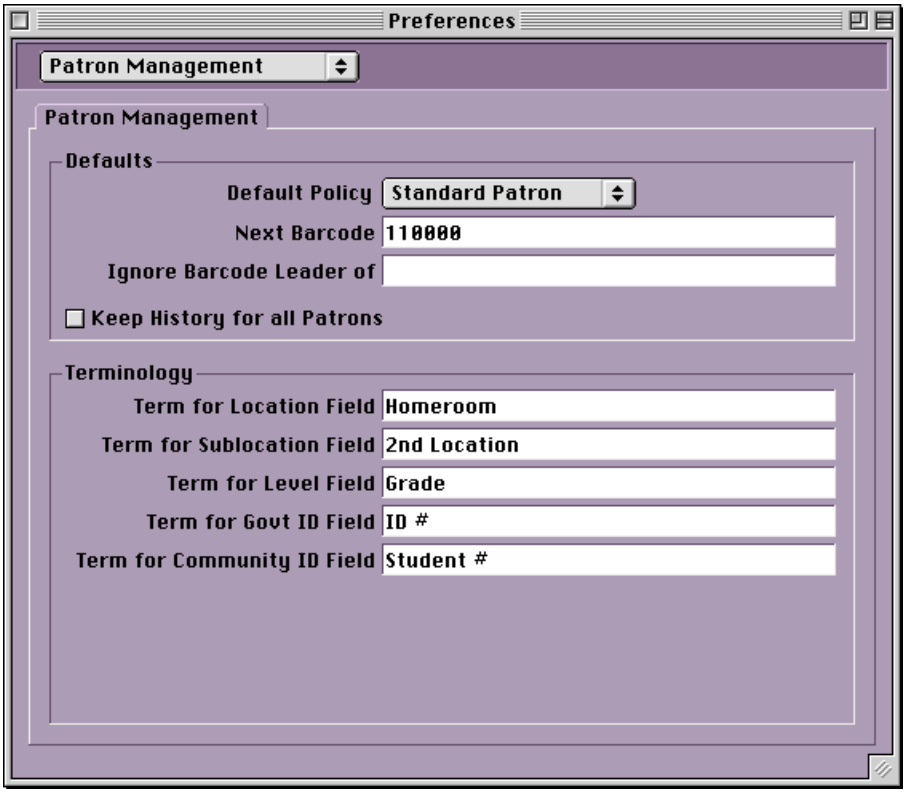
Enter text for order claim letters in this window. Claim letters can be printed by the librarian for incomplete orders. A claim letter is addressed to your Vendor and includes the Claim Letter text and a list of all items that have not been received for the order in question. Claim letters are only printed for **Issued** orders; **Open** or **Closed** orders can not generate a Claim letter.

The default Claim Letter is "`The following items were ordered but not delivered. If you can not deliver them within 4 weeks, consider them removed from the order.`"



Patron Management Preferences

Use this preference to configure general information about patrons such as Next Barcode, Default Policy, and terminology.



Default Policy—This pull-down menu shows the default policy for newly added patrons. Use the pull-down menu to choose a different default policy. If you later remove a patron policy, the **Default Policy** will revert to **Standard Patron**.

Next Barcode—The next available patron barcode number. When you enter a new patron, Alexandria assigns them the next available barcode (unless you assign a number manually). The default value is `1100000`.

You should set this field when you first configure Alexandria, so that any added patrons are assigned a patron barcode number that coincides with your numbering strategy.

Ignore Barcode Leader of—If you are using barcode numbers not designed for Alexandria, you can specify leading characters to be automatically ignored by Alexandria. For example, if your patron barcodes have the text "`PAT`" in front of each barcode, enter "`PAT`" in this field. Alexandria will ignore the "PAT" at the beginning of the barcode label. If you don't need this feature, leave the field blank.

Keep History for all Patrons—Check this box if you want Alexandria to keep a transaction history for all patrons. Default is `OFF`.

Terminology—This preferences let you determine terms for use in Alexandria.

Term for Location Field—This preference lets you configure the term used for the **Location** field. For example, you may want to use the term "Homeroom" rather than "Location." The term you choose appears on the **Personal Info** tab in **Patron Management** and wherever else Alexandria shows this information.

Although you can change this term, this manual uses the generic term "Location."

For school libraries, this defaults to "Homeroom"; for other libraries, this defaults to "Location."

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "1", "2", "402", you'd insert "001", "027", "402". Basically, all entries with a numeric range need to have the same number of characters.

Term for SubLocation Field—This preference lets you configure the term used for the **SubLocation** field. The **SubLocation** field appears under the **2nd Location** field on **Personal Info** in the **Patron Management** window.

You can use this field for whatever extra information you may need to enter. For example, you may want to use the term "Last Period" to identify an alternate location below the primary Location field. The term you choose appears wherever Alexandria displays this information.

Although you can change this term, the generic term "SubLocation" is used by this manual. Default value is "2nd Location."

Term for Level Field—This preference lets you configure the term used for the **Level** field. For example, you may want to use the term "Year" rather than "Level." The term you choose appears on the **Personal Info** tab in **Patron Management** and wherever else Alexandria shows this information.

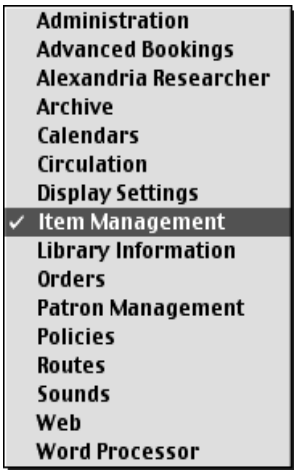
Although you can change this term, this manual uses the generic term "Level."

For school libraries (those with an "H1" in the activation code), this defaults to "Grade." For other libraries, this defaults to "Level."

Government ID—This field is used for National ID numbers. In the United States, this is typically the Social Security Number. Default value is "SSN."

Community ID—This field is used for Community or Local ID purposes. For school libraries, this defaults to "Student #"; for other libraries, this defaults to "ID #."

Unused Barcodes—Runs a list of all unused barcodes in the range you select. Barcode range cannot exceed "100,000".



Policies Preferences

Policies set rules that govern how patrons use your library, how items circulate, and how circulation periods and rules are computed. Policies are important for circulation purposes, reports, and statistics.

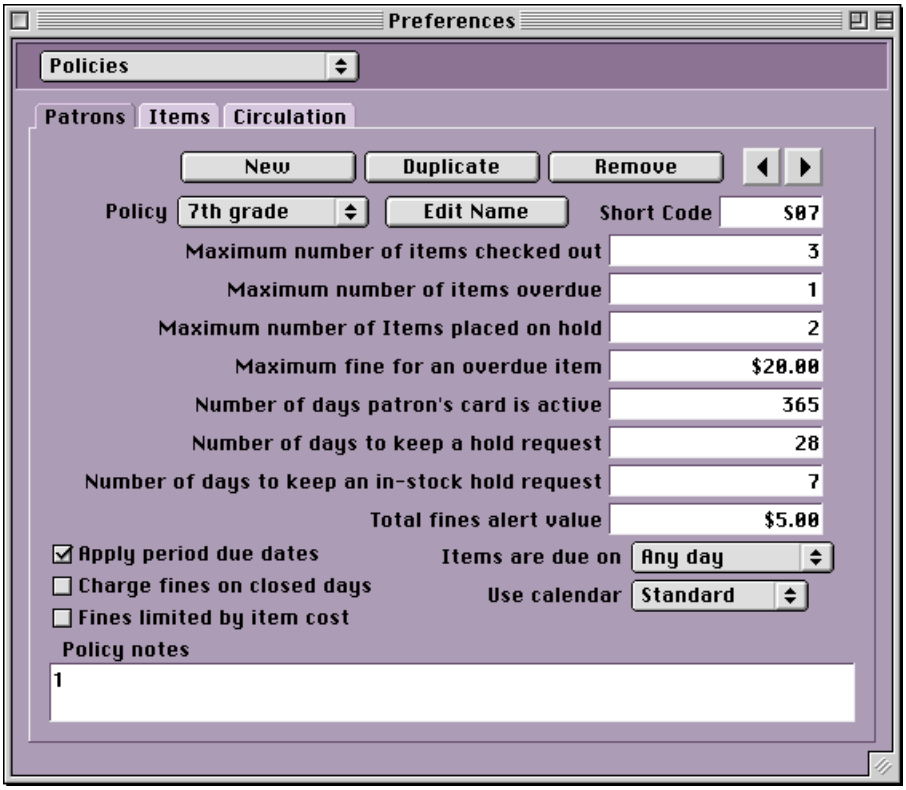
Use the **Policies** preference to customize these rules for your library. The **Policies** preference window includes preferences for patrons, items, and circulation.

To choose preferences for items or circulation, click on the appropriate tab across the top of the window. The preference window for that category appears. The subsequent sections describe each category of preferences.

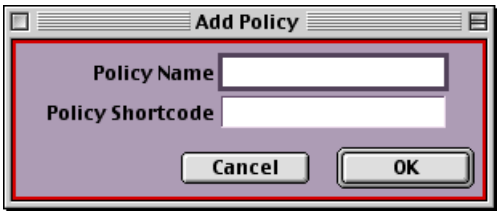
Patron Policies

Patron policies are the general rules that govern how patrons use your library. For example, eighth grade students can be given more privileges than second grade students. Use the **Patron Policies** preference to customize these rules for your library.

Alexandria automatically creates two patron polices: a **System Patron** policy (SYS) and a **Standard Patron** policy (STD). These policies cannot be removed from the system. The system policy is for special patrons with barcodes under 50. If you don't assign a policy to a patron, Alexandria uses the **Standard Patron** policy unless otherwise defined in the **Patron Management** preferences.



To add a policy, click on the **New** or **Duplicate** button. The following window appears asking you for information about the new policy.



Enter a **Policy Name** and **Short Code** (between 1-4 characters) then click **OK** to create the new policy using these values. If you selected **Duplicate**, the currently selected policy rules are copied. Otherwise, the **Standard Patron** rules are copied. You can then edit these values to customize the newly created policy to meet your needs. **Short Codes** and **Policy Descriptions** must be unique.

To remove a policy, click the **Remove** button. You can not remove a policy that is in use by existing patrons. The **Remove** and **Edit Name** buttons are hidden for the **Standard** and **System Patron** policies—as they cannot be removed or renamed.

If a patron exceeds the values you enter, a warning message appears. For example, if the patron tries to check out more books than the value entered in the **Maximum number of items checked out** field, a warning message appears.

When a warning message appears, you usually have the option to override the policy.

To change the settings for an existing policy, change values in the fields on the preferences window. The following list explains the fields.

Policy—This field shows the currently selected policy. Click on the field to select other policies you've defined for your library. You can edit this name by clicking on the **Edit Name** button.

Short Code—The Short Code is a short name for policies. These are used in reports and other places where long names don't fit well. **Short Codes** must be between 2-4 characters and must be unique. Default is the first 4 characters of the **Policy Name**—adjusted to make it unique (in case two policies start with the same 4 letters).

Maximum number of items checked out—This is the maximum number of items that patrons (under this policy) can check out. Default is `5`.

Maximum number of items overdue—This is the maximum number of items that patrons (under this policy) can have overdue and still be allowed to check out additional items. Default is `2`.

Maximum number of Items placed on hold—This is the maximum number of pending hold requests for patrons (under this policy) can be active at any one time. Default is `5`.

Maximum fine for an overdue item—This value limits the maximum fine that can be charged for an overdue item. If you select the "**Fines limited by item cost**" check-box, the maximum fine is **this** value or the book cost (whichever is lower). Otherwise, this value alone is used. If you want to allow unlimited fines, enter a large value here. Default is `$20.00`.

Number of days patron's card is active—This value is used as the default card expiration date for newly added patrons. Default is `365` days.

Number of days to keep a hold request—Hold requests that exceed the time limit in the patron's policy are automatically removed from the system. Default is `28` days.

Number of days to keep an in-stock hold request—In-stock hold requests that expire are automatically removed at the beginning of each day. A notice is prepared so that items may be returned to the shelves, or held for another patron. Default is `5` days.

Total fines alert value—If the patron's total fines exceed this value, an alert will appear when this patron becomes the Current Patron. If you want an alert for any patron with fines, set this value to `"$00.01"`. If you only want alerts for patrons with larger fines, set that value here. Default is `$20.00`.

Apply period due dates—Choose whether to apply period due dates to patrons under this policy. If you decide to apply period due dates, due dates for items are automatically adjusted at check out. Default is **ON**.

Charge fines on closed dates—If this box is checked, patrons under this policy are charged fines on both open and closed dates. Otherwise, fines are only charged on dates that the library is open. Default is **OFF**.

Fines limited by item cost—If you check this box, a fine for a particular item is limited to its Replacement Cost (if available), Copy Cost (if available), or the policy average cost (if available). Otherwise, an item's "value" is set at $20.00. If you don't set this, fines can exceed the cost of the item. Default is **ON**.

Items are due on—This field configures the day of the week that items are due. Use the pull-down menu to choose a day. If you choose **Anyday**, items will be due on their calculated due days. If you choose a day of the week, all patrons on this policy will have their items due on the day you set. Default is **Anyday**.

For example, if you set this field to Tuesday, books are due the first Tuesday after the calculated due date. If the day of the week is closed, due date will advance to the next closest open day.

Use calendar—This field shows the calendar used under this policy. Use the pull-down menu to choose a different calendar for this policy. If you remove a calendar that is being used by a policy, the **Standard** calendar automatically replaces it. Default is **Standard**.

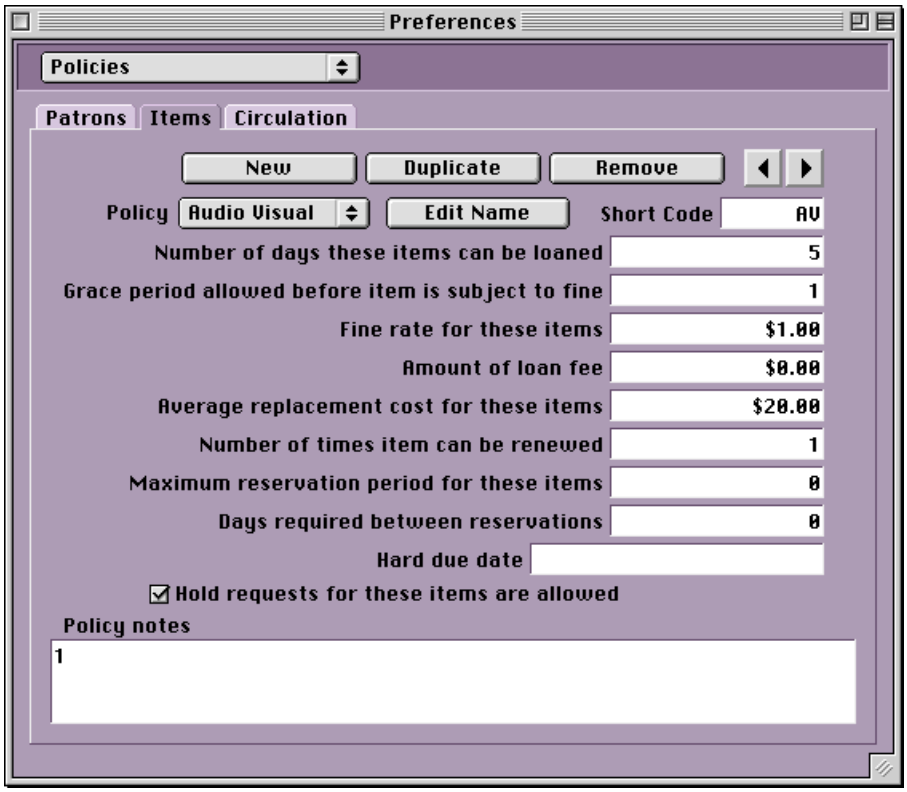
Policy notes—This field is used to enter a short note about the policy. This is only for the use of the librarian, as Alexandria doesn't use this information. Default is blank.

Item Policies

Item Policies are the general rules that govern how items are circulated in your library. For example, you can set policies to allow fiction works to be checked out longer than reference works. Use the Item Policies preference to customize these rules.

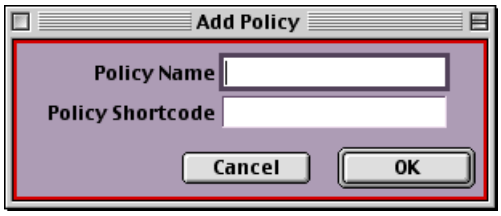
Alexandria automatically creates a **Standard Item** policy (STD) for items. The **Standard Item** policy is the default item policy. If you don't assign a policy to an item, it is assigned the **Standard Item** policy.

Click the **Item** tab on the **Policies** preference window to edit item policies.



To add a policy, click on the **New** or **Duplicate** button. The following window appears asking you for information about your new policy.

Enter a **Policy Name** and **Short Code** (between 1-4 characters) then click **OK** to create a new policy using these values.



If you selected **Duplicate**, the currently selected policy rules are copied. Otherwise, the **Standard Item** rules are copied. You can then edit the values to customize the newly created policy to meet your needs. **Short Codes** and **Policy Names** must be unique.

To remove a policy, click the **Remove** button. You can not remove a policy in use by existing items. Note that the **Remove** and **Edit Name** buttons are not selectable for the **Standard Item** policy.

If a patron exceeds the value you enter, a warning message appears. For example, if a patron tries to renew more times than the value you have entered in **Number of times item can be renewed**, a warning message appears.

When a warning message appears, you usually have the option to override the policy.

To change settings for an existing policy, change values in the fields on the preferences window. The following list explains the fields.

Policy—This pull-down menu shows the currently selected policy. Use the pull-down menu to select other policies you've created for your library. You can edit these names by clicking on the **Edit Name** button.

Short Code—The Short Code is a short name for policies. These are used in reports and other places where long names don't fit well. **Short Codes** must be between 1-4 characters. Default is the first 4 characters of the Policy name.

Number of days these items can be loaned—Enter the number of days items of this policy can be loaned. For example, to set a loan period of three weeks, enter `21`. Default is `14` days.

For items that you do not want checked out, set the loan period to `0` days.

Grace period allowed before an item is subject to fine—Enter a value to set the grace period allowed for overdue items before fines are computed. For example, if you set the grace period for 2 days, patrons are not charged fines until the third calendar day an item is overdue. At this point, they are charged fines for 3 overdue days. It doesn't matter if the library is open or closed on those days, the Grace Period is only computed on calendar days.

For easy check in, set the grace period one day longer than your commonly closed periods. For example, if you are commonly closed on Saturday and Sunday set the grace period for three days. Therefore, if the book is due on Friday, and it's turned in through the bookdrop on Saturday, when you check it in on Monday no fines will charged.

The default Grace Period is `3` days.

Fine rate for these items—Set the fine rate for items with this policy. The fine rate is computed daily. If you don't charge fines, enter `$0.00`. The default setting is `$0.10`.

Amount of loan fee—If you charge patrons a fee for checking-out items, enter a value here to set the fee amount for items with this policy. This fee is charged automatically when the item is checked out. The fee is recorded as "Loan Fee for {item title}." The default setting is `$0.00`.

Default replacement/Purchase value—Set the average replacement cost for items with this policy. This policy is used to assign replacement costs for items which you haven't specified a cost for in the copy record. The default is `$20.00`.

Number of times item can be renewed—Enter a value to set the number of times items under this policy can be renewed. If you don't allow items to be renewed, set the number to `0`. The default is `1`.

If a patron tries to renew an item that has already been renewed the maximum number of times, a warning message appears at the Librarian Workstation indicating that the patron has exceeded the policy limit for renewals.

Maximum reservation period for these items—Enter a value to set the maximum number of days an item can be reserved. If items aren't allowed for reservation, set the period to 0 days. If none of the copies allow reservations, the reservation window will not open and a message appears in the transaction log. If some copies allow reservations and some don't, the reservation window will open, but only copies which allow reservations are shown in the copies pull-down menu. The default setting is `14`.

Days required between reservations—If your library requires time to process an item that has been returned, this setting will enforce the processing time between reservations. For example, certain equipment may need to be calibrated after each use. If the calibration time takes two days, and you put two days in this preference, Alexandria will make sure that reservations are separated by at least two days. Default is `0` days.

Hard due date—You can set a fixed due date for all items with this policy. If the date entered here is AFTER today's date, it is used as your due date. Otherwise, Alexandria computes a due date according to other policy settings. Default is blank.

Hold requests for these items are allowed—Check this box to allow patrons to place hold requests on items. If you don't check this box, patrons cannot place hold requests on items under this policy. Default is `ON`.

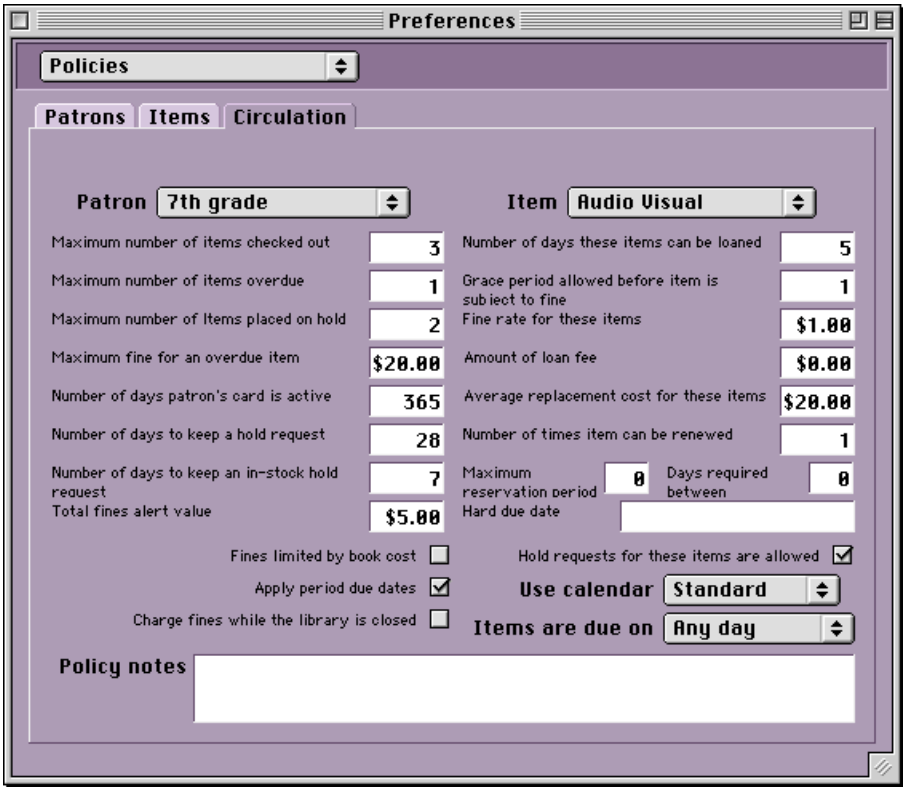
Policy notes—Enter notes about this policy. Notes are only for the librarian's use, they are not used for any policy calculations. Default is blank.

Circulation Policies

Circulation Policies are the specific rules used when patrons perform transactions with items in your collection. Alexandria creates a Circulation policy for every combination of patrons and items, using values entered into individual patron and item policies.

Use the Circulation Policies preference to customize these settings with your circulation exceptions. For example, you can configure Circulation policy so teachers can check out reference books but students cannot.

Click the **Circulation** tab on the **Policies** preference window to change Circulation policies.



You can edit a **Circulation Policy** by selecting a **Patron** and **Item** policy from a pull-down menu. For example, you can select **Standard Patron** and **Standard Item** to display the Circulation policy for this combination. This policy will display the rules used when a standard patron performs a transaction on a standard item.

Each Circulation policy is a combination of one patron and item policy. The original settings for a Circulation policy come from combining these patron and item policies.

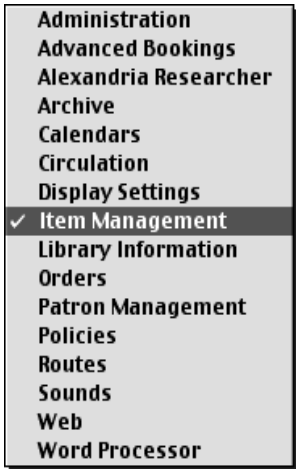
- If you change a patron or item policy, the default Circulation policy (which is a combination of the policies), is changed to match *unless* you've entered an exception into the Circulation policy window. If you enter an exception, it's used rather than the standard patron or item policy values.

- If you modify settings in a Circulation policy, those values are used until you change them back to the default values. Patron and item policies are not affected by changes you make in the Circulation policy.

The following examples show how policy changes take effect:

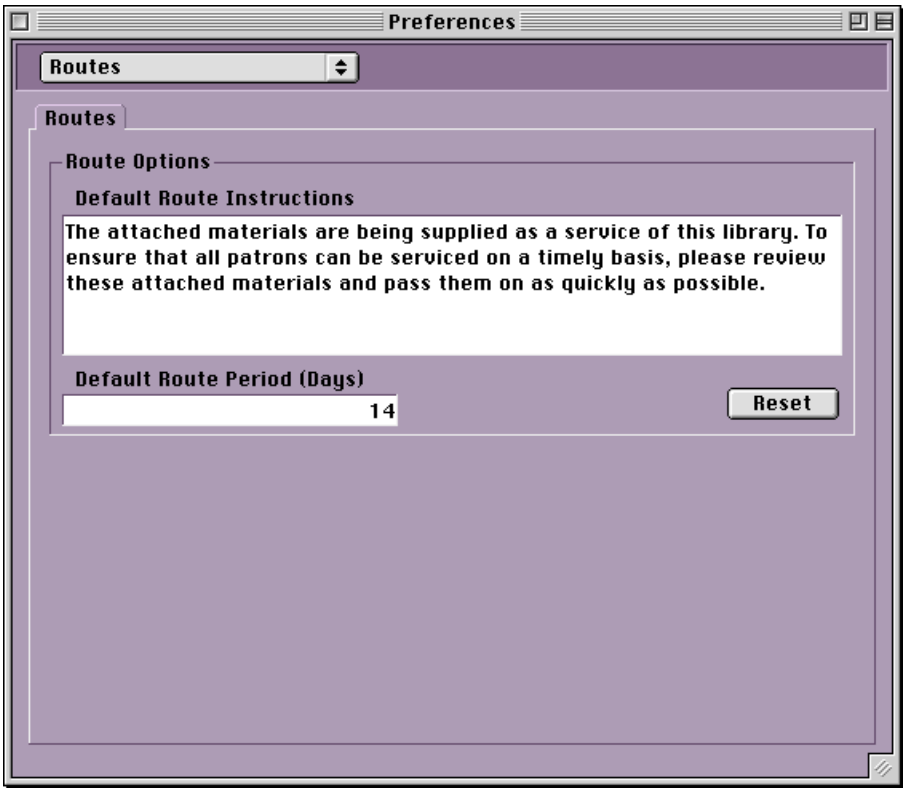
Example 1—A loan period is 14 days under a particular item policy and you have *not* changed this value in the Circulation policies window. If you change the setting in the item policy window from 14 to 21, all Circulation policies using this item policy are updated.

Example 2—A loan period is 14 days under a particular item policy but you *changed* this value in the Circulation policies window to a custom setting to allow teachers a loan period of 30 days. If you change the setting in the item policy window from 14 to 21, the 30-day setting remains in the customized Circulation policy; only those records you *didn't* customize would be changed.



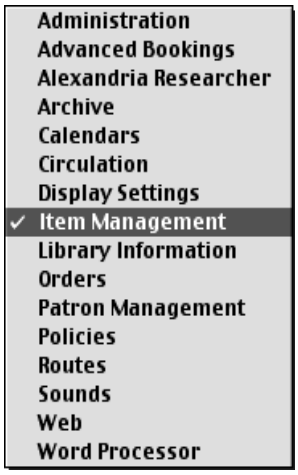
Routes Preferences

Allows the librarian to specify Route preferences.


Preferences
Routes
Routes
Route Options
Default Route Instructions
The attached materials are being supplied as a service of this library. To ensure that all patrons can be serviced on a timely basis, please review these attached materials and pass them on as quickly as possible.
Default Route Period (Days)
14
Reset

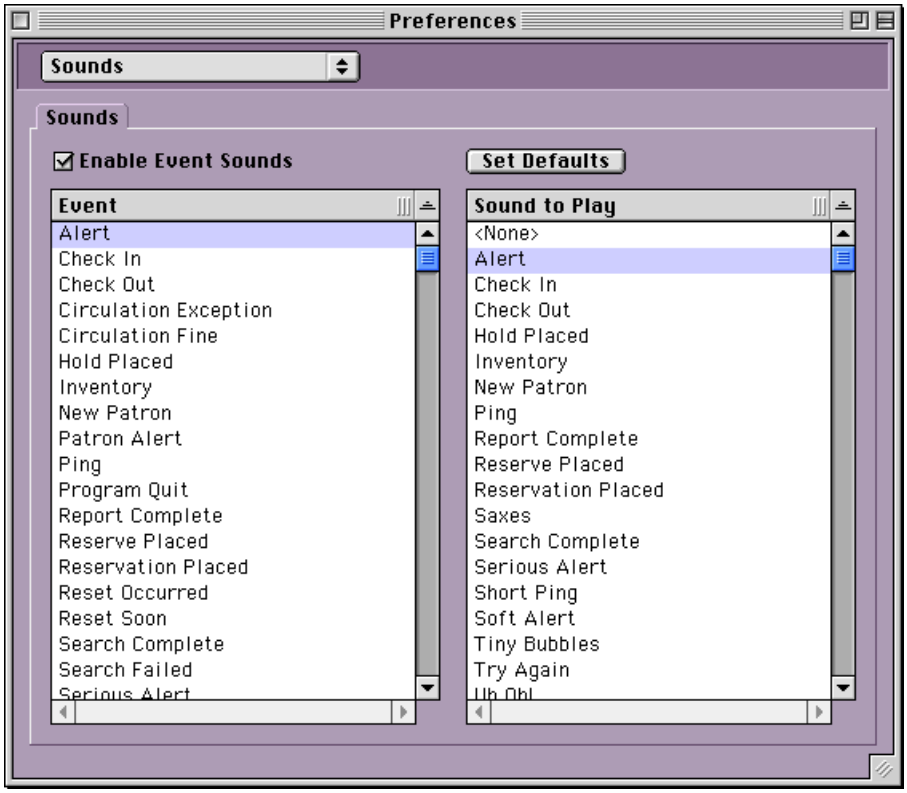
Default Route Instructions—The default text for new routes. Default is "`The attached materials are being supplied as a service of this library. To ensure that all patrons can be serviced on a timely basis, please review these attached materials and pass them on as quickly as possible.`".

Default Route Period—Sets the new default route period. Default is `14` days.



Sounds Preferences

Use this preference to set what sounds play when certain events occur.



The subsequent section lists the sounds you can associate with an event.

- HINT -

If you don't want Alexandria to play sounds, check **OFF** in the **Enable Event Sounds** check-box. Default is **ON**.

Click on an event to select it, then click on the sound you want to play when that event occurs. For example, if you want the sound of a sax to play when a book is checked in, choose **Check In** from the **Event** column and choose **Saxes** in the **Sound to Play** column.

Event—These are the events to which you can attach a sound.

Alert—Indicates that the user's attention is required by Alexandria. Default sound is **Alert**.

Check In—Indicates that an item was checked in. Default sound is **Check In**.

Check Out—Indicates that an item was checked out. Default sound is **Check Out**.

Circulation Exception—Default sound is **Alert**.

Circulation Fine—Default sound is **Serious Alert**.

Hold Placed—Default sound is **Hold Placed**.

Inventory—Default sound is **Inventory**.

New Patron—Default sound is **New Patron**.

Patron Alert—Default sound is **Serious Alert**.

Program Quit—Indicates that Alexandria has quit. Default sound is **Saxes**.

Report Complete—Default sound is **Report Complete**.

Reserve Placed—Default sound is **Reserve Placed**.

Reservation Placed—Default sound is **Reservation Placed**.

Reset Occurred—Indicates that a reset is about to occur. The Alexandria Researcher is reset after the sound is played. Default sound is **Very Serious Alert**.

Reset Soon—Indicates that the reset alert window is displayed. Default Sound is **Serious Alert**.

Search Complete—Default sound is **Search Complete**.

Search Failed—Indicates that the search was unsuccessful in locating any matching items. Default sound is **Try Again**.

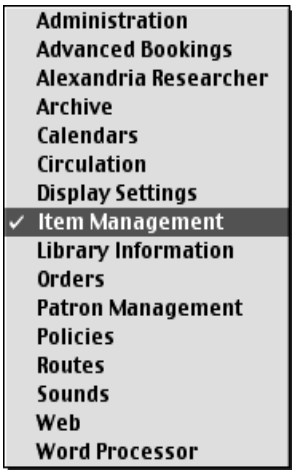
Serious Alert—Indicates that the user's attention is wanted for a serious event. Default sound is **Serious Alert**.

Utility Complete—Default sound is **Report Complete**.

Very Serious Alert—Default sound is **Very Serious Alert**.

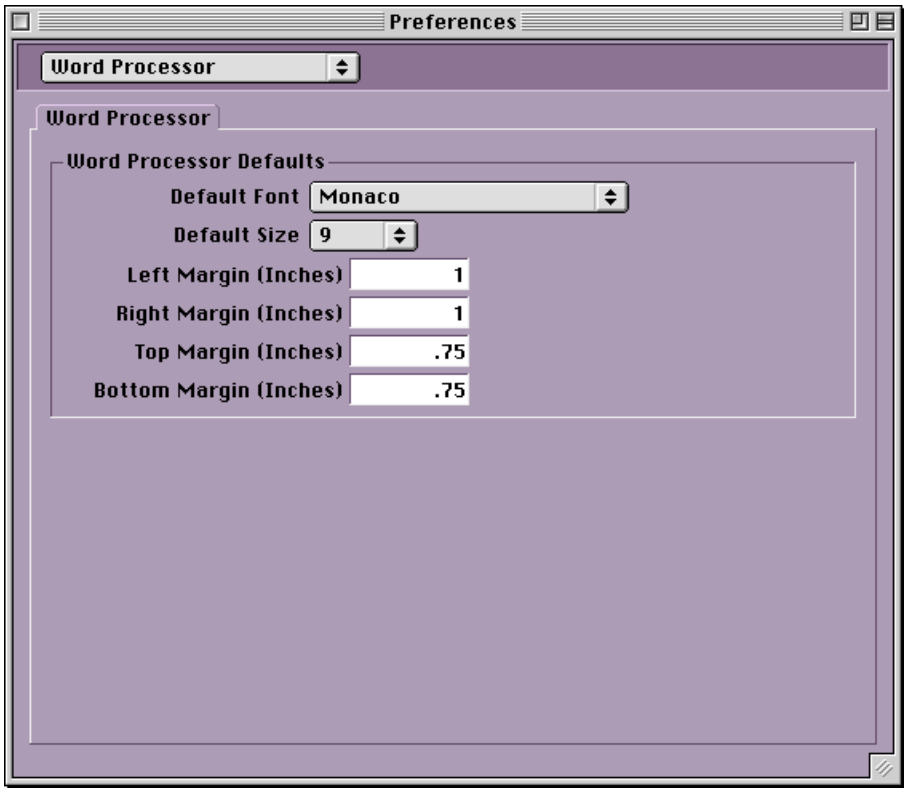
Welcome—Indicates that Alexandria has launched. Default is **Welcome**.

Use the **Default** button to reset all sounds to their default values.



Word Processor Preferences

This preference window is used to set defaults when a new word processor document is opened.



Default Font—Selects the default font selection. Default is Geneva.

Default Size—Selects the default font size. Default is 12 point.

All margins are from the edge of the paper. Since most printers can't print to the very edge of the paper, you should use a margin of at least ".25" inches.

Left Margin—Set the default left margin. Default is 1 inch.

Right Margin—Set the default right margin. Default is 1 inch.

Top Margin—Set the default top margin. Default is 1 inch.

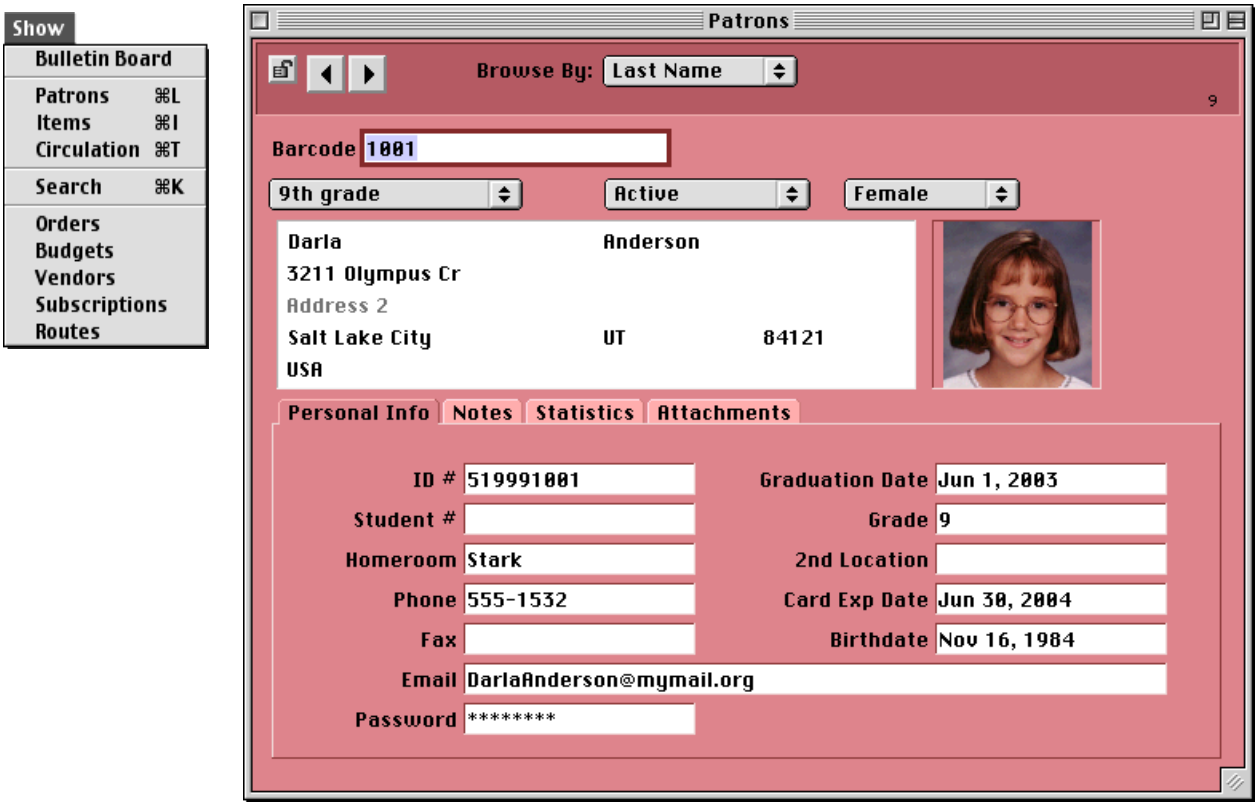
Bottom Margin—Set the default bottom margin. Default is 1 inch.

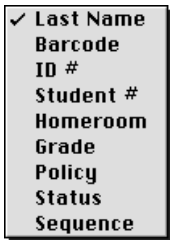
Patron Management

This chapter includes a general description of managing patrons using the **Patrons** window and how to Add, Remove, Modify, Browse, Find, and Display patron information *(see "Patron Management Preferences" on page 89)*.

Patron Management Window

The **Patrons** window displays information about patrons in your library. To display the **Patrons** window, select **Patrons** from the **Show** menu.

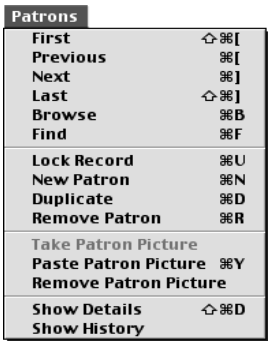




The top portion of the window contains primary information about the Current Patron. This includes the patron barcode (**1001**), policy (**9th Grade**), status (**Active**), sex (**Female**), and patron sequence (**#9**) as well as name and address information and an optional picture of the patron.

More information about the patron is contained on the bottom-half of the window on individual tabs. Click on a tab to display more information.

The patron you are presently in the progress of viewing is called the **Current Patron**. Selecting the Circulation window automatically reveals the Current Patron. Likewise, if you have a Current Patron displayed on the Circulation window and select the Patrons window, the same Current Patron is displayed.



Using the Patrons Menu

You can view, modify, add and remove patron information using the **Patrons** window and the commands in the **Patrons** menu. When the **Patrons** window is the foremost window, a **Patrons** menu becomes available in the menu bar.

The **First**, **Previous**, **Next** and **Last** commands display the indicated record (first, previous, next or last) based on the order of the records shown in the **Browse By** field.

The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.

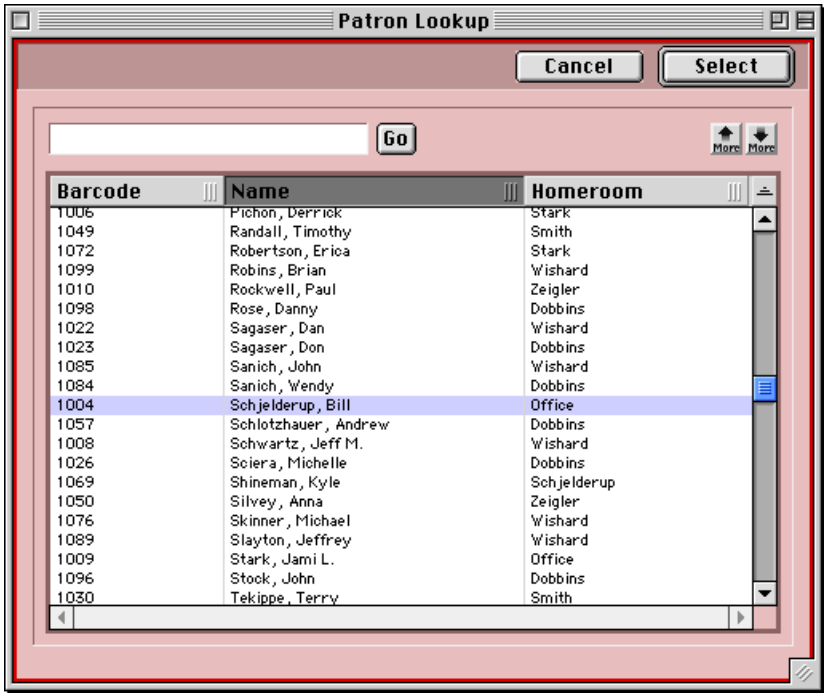
First—Displays the first record according to the **Browse By** order.

Previous—Displays the previous record according to the **Browse By** order.

Next—Displays the next record according to the **Browse By** order.

Last—Displays the last record according to the **Browse By** order.

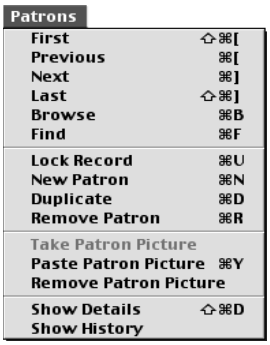
Use the **Browse** command to view a quick list of patrons starting with the currently selected record.



Use the up and down arrow keys to move through the list. To display more patrons, click on the More buttons on the top right of the window or press the up or down arrow key to move upwards or downward at the ends of the list. To position the *browser* at another patron, information in the empty field to the left of **Go** and then click on the **Go** button.

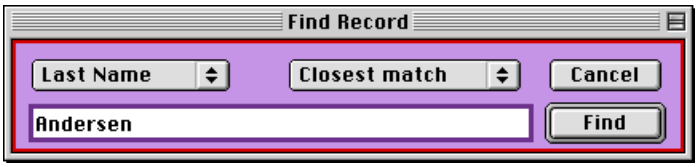
To select a patron in the list, either double-click on the patron or click on the patron once and click on **Select** or press the <enter> or <return> key on your keyboard.

When you select a record on the **Browse** window, the selected record is activated and displayed. To leave the **Browse** window without changing the current record, select **Cancel**.

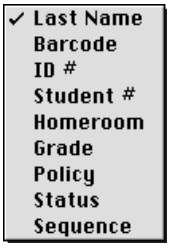


Finding Records

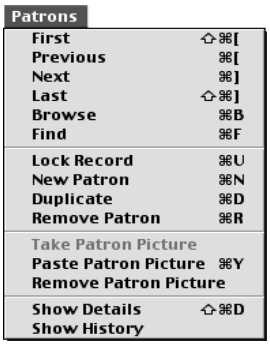
The **Find** command under the **Edit** menu can be used to locate a specific record. For example, if you are looking for a patron with the last name "Andersen," Alexandria finds the first patron record with that name and displays it as the Current Patron in the **Patrons** window.



The first field menu allows you to select where to search for the data. The second field allows you to select **Closest match** or **Exact match**.



Click on **Find** to locate the record, or click **Cancel** to stop the Find operation and return to the most recent Patron record. If a **Find** is performed, the **Browse by** selection is automatically set to the same selection as the Find key.



Modifying Patron Information

You can edit information directly in the **Patrons** window or in any of the tabs on the window. You can edit information in these windows the same as you would in other application. For example, you can place the cursor in an existing value and type additional values or you can highlight a value and type over it. Before records can be changed, they must be unlocked by using the **Unlock** command *(see "Changing Records" on page 46)*.

> **- NOTE -**
>
> If your preferences are set to lock records, you'll have to unlock the record first by clicking on the lock icon or selecting **Unlock** from the Preferences menu before you can make changes to the record.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the field. To select from a pull-down menu, <tab> until the pull-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

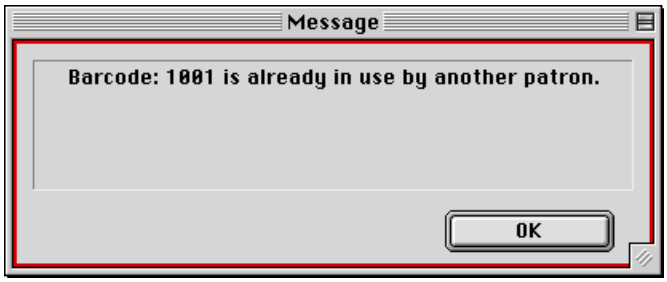
When you have modified all the information you want in the record, click the **Save** button in the upper right of the window. The record is saved. If you want to ignore the information you have entered, click the **Revert** button to display the previous record and throw away your changes.

If you try to select another record or leave the window without saving your input, the following warning message appears.

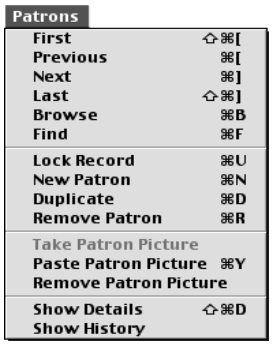
Message
The current record has not been saved. Do you wish to save it before viewing another record or window?
Cancel
Discard
Save

Click the **Cancel** button to return to the window with your input still displayed. Click the **Discard** button if you want to ignore the data you entered. Click the **Save** button or the <enter> key to save your changes.

If you try to save a record with a barcode that is already in use (say, 1001), the following window appears. You will have to change the barcode to a unique barcode or discard all changes.

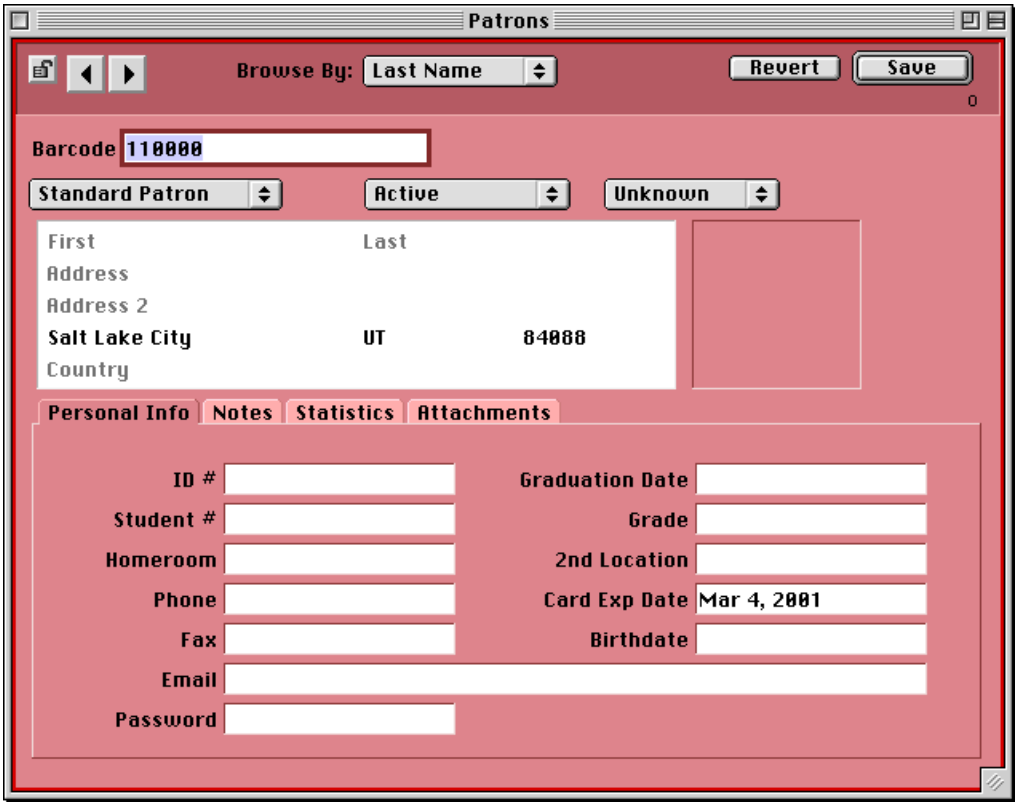


If you want to modify the information for a group of patrons, use the appropriate utility *(see "Patron Utilities" on page 338)*.



Adding New Patrons

Use the **New Patron** command to add a new patron to your database. When you select the **New Patron** command, the **Patrons** window will appear with fields where you need to add information.



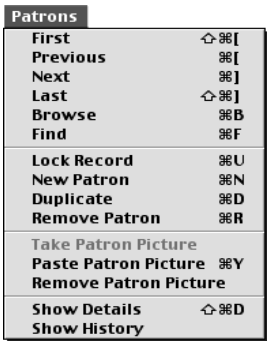
Fill in all the data fields in the window (such as First, Last, Address, and so forth) to add a new record. Alexandria automatically copies the **City**, **State**, **Postal Code** and **Country** from your library address *(see "Library Information Preferences" on page 84)* for the new patron.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the field. To select from a pull-down menu, <tab> until the pull-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

The **Barcode** and **Last Name** fields are required to add a new patron. Alexandria automatically displays a barcode number based on the value you entered in the **Next Barcode** field in the **Patron Management Preference** window *(documented on page 89)*. You may type over this value to change it.

When you have added all the information you need for this patron, click the **Save** button in the upper right of the window. If you want to ignore the information you have entered, click the **Revert** button. The previous patron is displayed.

You can add many patrons quickly if you have their data in electronic format *(see "Data Import" on page 351 for complete instructions)*.



Duplicating a Patron

Use the **Duplicate** command to make a copy of an existing patron. You can then modify the information to create a new patron. This will save the data entry time when you add patrons who have similar information such as location, graduation date, policy and status.

When you select the **Duplicate** command, the **Patrons** window appears with a copied version of the Current Patron information. This window will automatically select the next available barcode for patrons rather than copying the barcode from the duplicate record. Type over the information on the window with the appropriate information for the new patron.

Removing a Patron

At times you need to remove a patron from your system. Removing patrons who no longer use your library helps ensure the accuracy of your reports.

> **W A R N I N G !**
>
> Before you remove a patron, backup your data files. Removing patrons is permanent and cannot be undone! If you erroneously remove a patron, you will have to re-enter all their information or recover the information from a backup copy of your data.

Use the **Remove** command to permanently remove the Current Patron.

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations that the patron has pending. A patron with items checked out *cannot* be removed until all items have been returned to the library or recorded as lost.

Take Patron Picture

If you have the correct software installed, you can use a digital camera to snap a Patron's picture. Use this command to begin the process.

Paste Patron Picture

If you have a picture on your computer clipboard, this command will paste it into the patron picture field.

Remove Patron Picture

Clears the Current Patron picture.

Show Details

Shows details for the current patron. Displays the same report as the **Details** button on the Circulation window.

Show History

Shows the history of patron transactions. When history is turned `OFF`, only payment and fine history are maintained and displayed.

Special Patrons

When you start Alexandria, it creates several special patrons using barcodes 1 through 6. These patrons are used to track items with a special status such as lost, archived, On Order or out for repair. Barcodes numbered 1-19 are reserved for Alexandria usage. If you attempt to add barcodes in these ranges, they will automatically be reassigned by the system. You can not Add, Remove or Modify records in this range.

Special patrons are generally not shown in browse lists, reports or other areas of the program. In order to view them, they must be selected via barcode number in either the Circulation window, or Patron Find window.

Barcode numbers 20-49 are reserved for the librarian's special usage, and (similar to 1-19 barcodes) are not generally shown to the user unless specifically requested. However, the librarian can Add, Remove or Modify these records.

For example, when you send an item out to be repaired, you can check the item out to On Repair (Barcode 4). This leaves the item inventoried but prohibits another from checking it out when it's not available. When the item is returned, you simply check it back into the library and it's available for circulation again.

If you accidently assign some of your patrons with system barcodes, all you need to do is go back and change their barcodes to fit your specified barcode range.

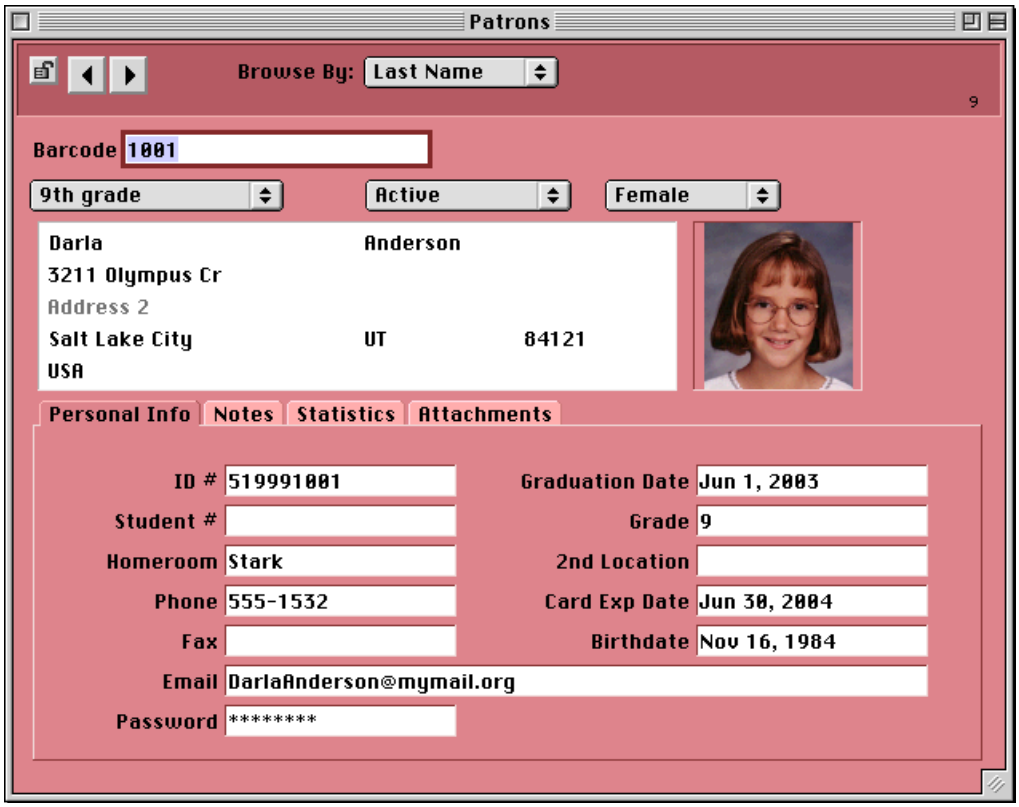
The following is a summary list of special patrons Alexandria creates. You can also create your own special patrons for tracking particular items.

- **Lost Items** (Barcode 1) to identify items you cannot find in your collection.
- **Discarded Items** (Barcode 2) to identify items you no longer want used in your library.
- **For Library Use** (Barcode 3) to assign items for use within the library.
- **On Repair** (Barcode 4) to track items you have sent out of the library for repair.
- **On Order** (Barcode 5) to track items you have on order but have not yet been received or shelved.
- **Archived Items** (Barcode 6) to identify items kept in the library and generally not checked out.

Patron Information Fields

The following section describes the data fields in the **Patrons** window on each tab. When a field has an obvious meaning or use (such as City or Phone), it will not be included in the explanation unless there are special notes about how it is used.

Primary Patron Information



The top portion of the **Patrons** window contains information about the patron. This includes the patron barcode, policy, status and sex, as well as name and address information, and a picture of the patron.

These are fields that cross the top of the **Patrons** window:

Patron Barcode—Each patron will have a unique barcode number that is either assigned by the system or entered manually. This barcode can contain up to 15 digits and must be unique. It may contain numbers or letters, but no punctuation characters or spaces.

Patron Policy—The policy you assign to a patron determines the library rules that this patron must follow. To select a policy for a patron, click the arrow at the end of the **Policy** pull-down menu and choose a value. The default policy for new patrons is automatically assigned based upon the **Patron Management Preferences** *(see "Patron Policies" on page 91 for more information).*

Patron Status—The third field across the top of the **Patrons** window is the patron status field. A patron's status identifies Active patrons and those with special circumstances such as a Lost Card, Suspended or Transferred.

To select a status for a patron click on the arrows at the end of the patron status pull-down menu. The following values are available:

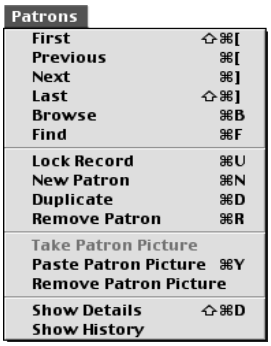
- **Active—**A patron whose status is active can use the library (check in and check out books) according to the rules of the assigned patron policy.
- **Lost Card** or **Suspended—**This status causes a message to display at the Librarian Workstation when the student ID/barcode is entered. The message recognizes a patron's status and asks the librarian to verify that it's okay to continue with this patron.
- **Transferred**, **Inactive**, **Other—**These status options are for generating patron reports for patrons with specific statuses. For example, you could generate a list of all patrons that have transferred or are inactive. These statuses cause a message alert at the Librarian Workstation when the student ID/barcode is entered.

Sex—Click on the arrow at the end of this pull-down menu to select the patron's sex. The default is **Unknown** until the patron's sex is identified.

First—Enter the patron's first name or the first name and middle initial.

Last—Enter the patron's last name. This field is required, you can not save a patron record without a last name.

Address, **City**, **State**, **Postal Code**, **Country—**Enter the patron's mailing address. Notices and letters are sent to this address.

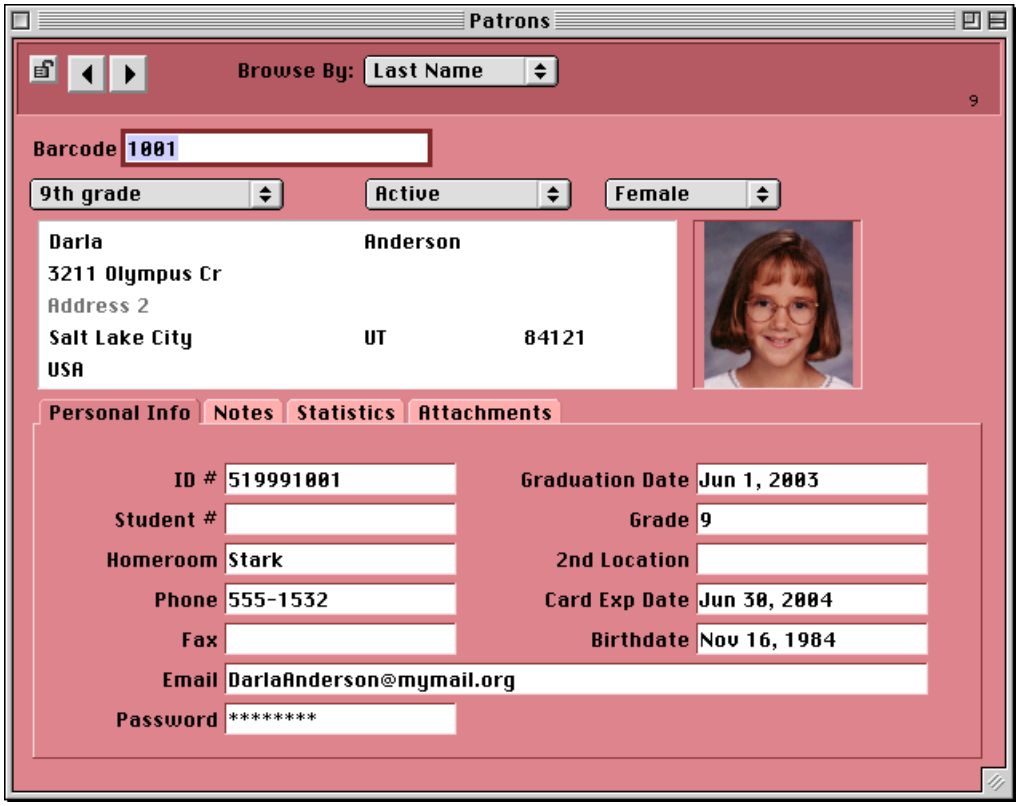


Patron Picture—You can add a patron picture to the patron record. The picture will appear in the box under the gender menu in the Patron window and in the Current Patron section of the **Circulation** window. There are several ways to add a picture to the **Patrons** window:

- **Drag and drop—**Open the picture of the patron in the application where it was created. Drag the graphic from the desktop or program onto the **Patrons** window in Alexandria. As you drag the picture, a box outline shows where the picture is to be placed to help you align it properly.
- **Copy and paste—**Open the picture of the patron in the application where it was created. Select the graphic and copy it to the clipboard (this is usually done with commands such as **Select All** and **Copy** and **Cut** under the **Edit** menu in the program). Go back to your Alexandria **Patrons** window and choose **Paste Patron Picture** from the **Patrons** pull-down menu at the top of the window. The picture appears in the area under the gender button.
- **Take a picture—**If you have a digital camera and it's attached to your computer, you can take a picture and place it directly in this window using the **Take Patron Picture** command under the **Patrons** menu.
- **Sequence #—**A unique number assigned to the patron by Alexandria. This number is useful for browsing by order of entry.

Personal Info

Here is a brief description of the fields located on the **Personal Info** tab:



Government ID, Community ID[1]**—**(Shown as ID# in the sample window). These are alternate unique ID codes you may want to use with Alexandria. If you plan on updating patron information automatically from a central administration system (or you want to locate patrons by alternative codes, enter data in these fields).

In the United States, the Government ID is typically the Social Security Number (**SSN**); other countries may use other formats. Community ID is designed to be used for your local ID. This could be a Student Code, Phone Number, Parcel Number or any other unique identification code. Duplicate values are not allowed; if a duplicate code is entered, Alexandria will automatically modify it to make it unique.

Location—(Shown as Homeroom in the sample window). The location of a patron in a school is typically the student's homeroom or first period class. You can change the name of this field in the Terminology section of the Patron Management preference window. To ensure the accuracy of reports, *be consistent* when entering information in this field. Reports can be generated and sorted by this field. For example, you may print an overdue list of all students in a homeroom with overdue items.

Phone and **Fax—**Enter the phone number and fax number that should be used to notify the patron of special events, overdue items, in-stock holds, and other official library business.

1. This term can be customized by the librarian *(see "Patron Management Preferences" on page 89 for instructions)*.

Email—Enter the Email address for the patron if you plan to use Email for notification purposes such as overdue notices. If you choose Email as the type of report when printing overdue notices, the notice is sent to the specified Email addresses. If you don't enter a valid address or leave the field blank, Email messages will not be sent to patrons.

Password—An optional password can be entered for the Patron. For security reasons, passwords are shown as "*" characters and are used by the patron to identify themselves when performing remote transactions. The password will default to the patron's **Last Name** without spaces or punctuation.

Graduation Date—Enter the date the patron will graduate. This field is used to compute the patron's current grade. Patrons automatically graduate to the next grade level on the date you enter as the last day of school on the Library Information preference window. Graduated patrons are given grade level "graduated".

Level[1]**—**This field identifies the patron's level in school. If this is a school library and a graduation date has been entered, Alexandria will assign the level based on your preferences. If you enter a level and this is a school library, Alexandria will calculate the graduation date for you. Alexandria will advance patrons one level after the last day of school if the level is set to either "JK" (junior/kindergarten), "PS" (pre-school), "K" (kindergarten), or "1-12".

Option[2]**—**(Shown as 2nd Location in the previous sample window) Use this field to group patrons by a second location or to track any other useful data. You can enter letters, numbers, as well as spaces in this field.

Reports can be generated and sorted by this field. Therefore, to ensure the accuracy of reports, *be consistent* when entering information in this field. You could, for example, use this field to classify the ethnicity of patrons for government or internal reports.

Card Exp. Date—Enter the date the patron's library card expires. If you leave this field blank, Alexandria will calculate the expiration date based on the patron's policy when the patron record is first added to the system. For example, if a Patron Policy in Preferences is set for 365 days, the card will expire 365 days from the date the patron was entered.

Birth Date—Enter the patron's birth date. This information is used solely for reference.

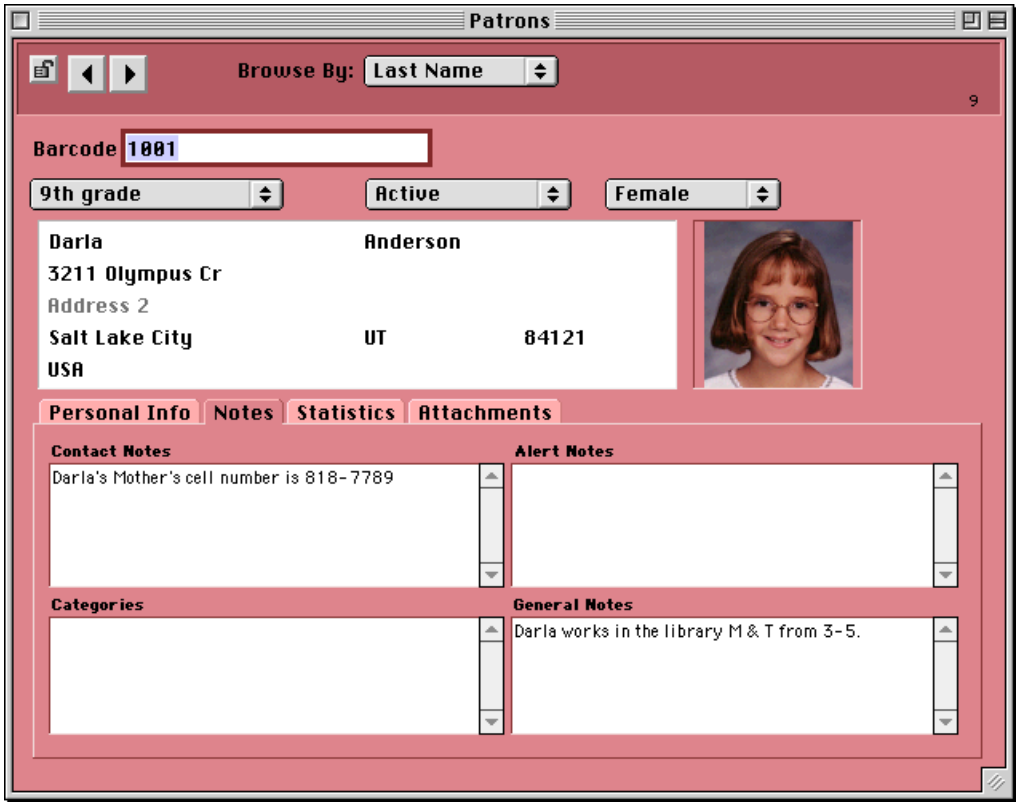
Parent/Guardian—Enter the patron's parent or guardian. This information is used solely for reference.

---

1. This term can be customized by the librarian *(see "Patron Management Preferences" on page 89 for instructions)*.
2. Authority Control is available for Location and SubLocation by pressing <option-tab> on Macintosh or <ctrl-tab> on Windows.

Notes

The Notes tab includes information about the patron's emergency contacts as well as groups the patron belongs to and general notes about the patron.



Contact Notes—Identifies the parent or guardian you need to contact in case of emergency. Enter the contact name, address and phone number if it is different from the patron's address and phone number. You may enter more than one name and address.

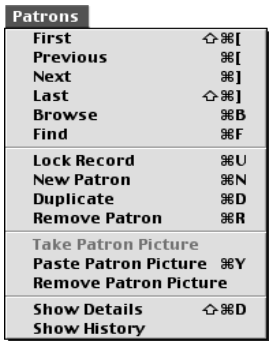
Categories—Enter information about groups the patron belongs to. Such as, special reading programs, at-risk students, special education students, gifted students, library contest students, or any other group you find useful. The categories can be used to select patron records for reports.

Alert Note—This field is used to make the librarian aware of special circumstances regarding a patron. For example, you can enter an alert message to pass on to the patron next time the patron is in the library. The alert message automatically appears on the **Circulation** window when you enter the patron's barcode number.

General Notes—This field is used for additional comments about a patron. These comments can be viewed only from the Librarian Workstation. When any notes exist for a patron, a **Notes** button appears under the patron's picture on the **Circulation** window when he/she is the Current Patron. Click the **Notes** button to view the notes entered for this patron.

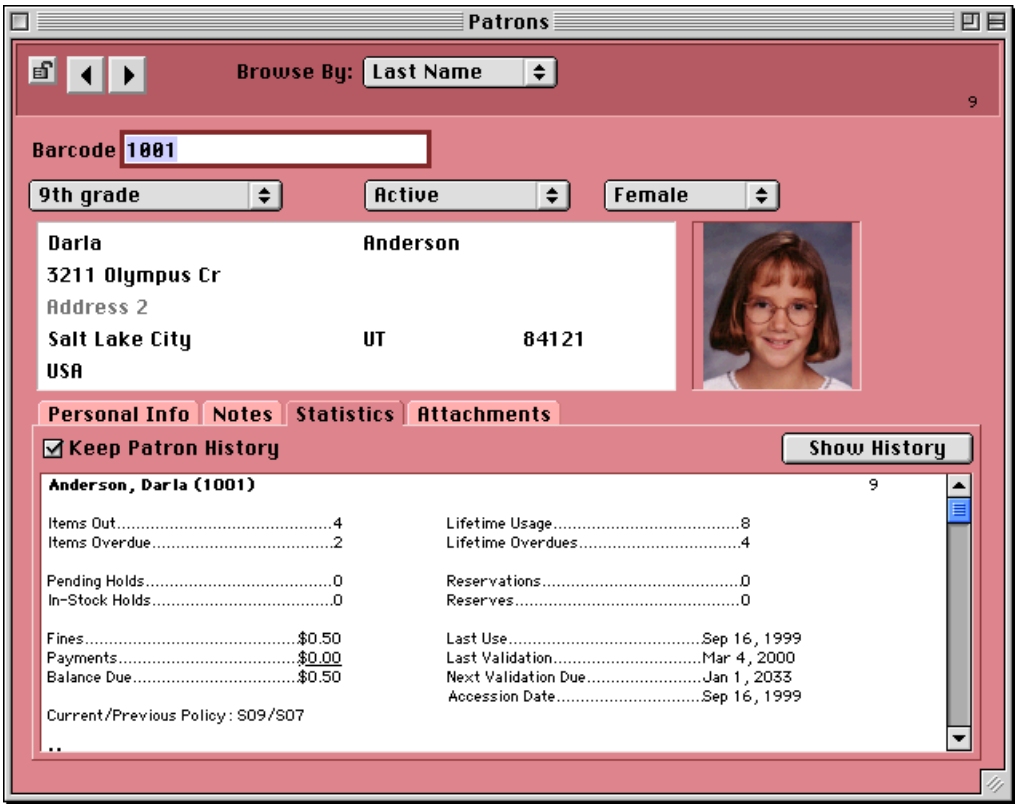
- NOTE -

If any notes exist for a patron, a plus sign (+) appears next to the patron's name on the **Circulation** window. You can enter a plus sign <+> on the command line in the **Circulation** window to display the note when the patron is the Current Patron.



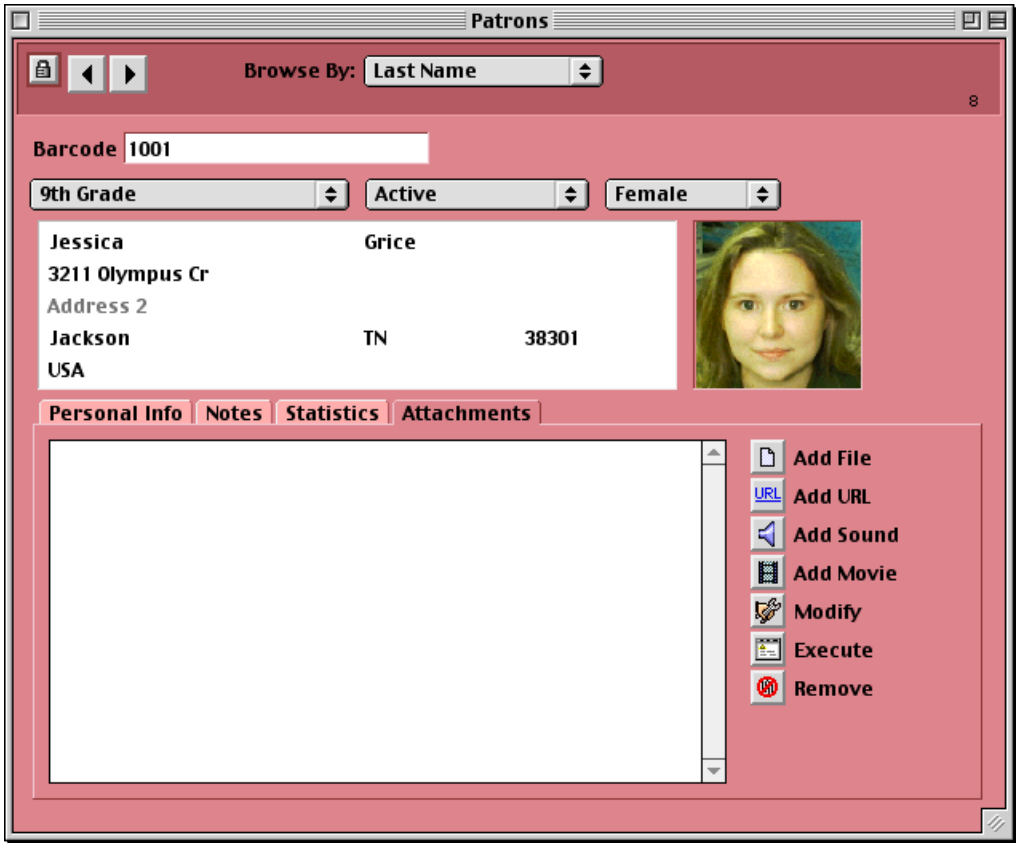
Statistics

The Statistics tab includes statistics about the patron's use of the library. Alexandria automatically generates this information and you cannot modify it.



Keep Patron History—When this box is checked, Alexandria keeps a history of this patron's transactions. You can view the transaction history data by using the **Show History** selection on the **Patrons** menu or the button that appears when this option is checked (activated).

Attachments



You can associate web pages, multimedia and other documents to a patron using the Attachments tab. To add attachments, use the icons on the right of the window, or drag and drop documents into the attachment list. To edit an attachment, double-click on its name in the list. To view the attachment, `<option>`-double-click on its name in the list.

Attachments are shown in the **Patron Details** window.

Item Management

This chapter explains how to manage information for the items in your library. Maintaining information about items includes viewing, adding, modifying, and removing item records.

> **- NOTE -**
>
> If you are using a multi-collection license of Alexandria, all libraries share the title information, and thus, all other libraries view any changes you make.
>
> The Alexandria Librarian workstation allows you to view and edit titles from all the collections, but only your title statistics and copy information can be modified at your workstation.
>
> The District Librarian Workstation allows viewing and editing of all the information in the database across all collections.

About Marc records

All Alexandria item data is saved in Marc[1] (Machine-Readable Cataloging) record format, the standard for bibliographic data around the world. If you don't know Marc standards, Alexandria has an easy entry editor that lets you view and edit Marc data without any technical Marc knowledge.

For those who are familiar with Marc standards, a powerful Marc Editor is available for viewing and editing your data. You can switch between the two editors using a menu selection or keystroke.

Although it's hidden from you, Alexandria saves additional information in the Marc record for performing its library automation duties. This information is Alexandria-specific and is NOT shown in the Marc editor. However, if you copy records for transfer to another Alexandria system, the export routines include this Alexandria-specific information.

The Marc standard is complex and ever changing. Thus, there may be information in your Marc records which is a valid Marc data, but unused by Alexandria. It may be that new versions of Alexandria could use this data, so it's carefully saved with the rest of the Marc data. If you have Marc information that you'd like Alexandria to process, send a written request to:

```
Alexandria Marc Suggestion
COMPanion Corporation
1831 Fort Union Blvd.
SLC, UT 84121
```

Or, send an Email to: "`v5Comments@companioncorp.com`"
Your request will be examined and you'll receive a response.

---

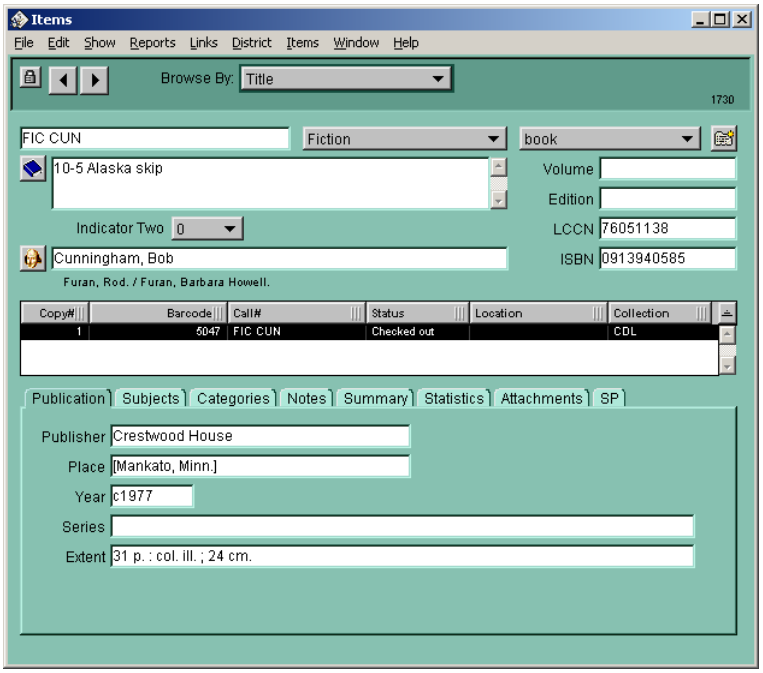
1. To learn more about Marc tags and subfields, visit the Library of Congress' website at "`http://www.loc.gov/marc/`"

Item Management Window

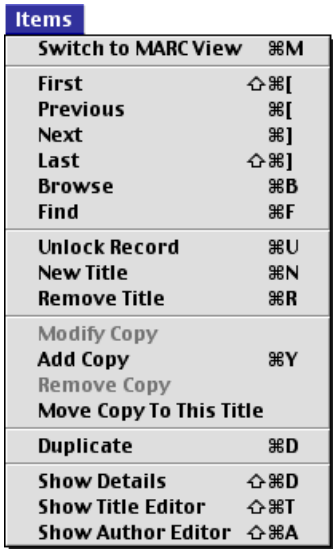
The **Items** window displays information about items in your library. All items that circulate, such as books, magazines, audio and videotapes, are accessible through the **Items** window.

The term "item" can also be called title, issue, or copy depending on the context. An item can be a book, video, filmstrip, newspaper, or any other form of media in your collection. Each title can have many copies. Title Information consists of data that is identical for all copies of a particular title, including author, publication, and notes. Copy Information consists of data specific to a given copy. You can double-click on an item in the copy list to display detailed information about the copy.

Under the **Show** menu, select **Items**.



The top portion of the window contains primary information about the current item. This includes the call number, title policy, medium, title, author, and other publishing information. Other information about the item is displayed at the bottom of the window on separate tabs. Click on a tab to show the information it includes.



Using the Items Menu

You can view, modify, add and remove item information using the **Items** window and the commands under the **Items** menu. When the **Items** window is the foremost window, an **Items** menu is available in the menu bar.

The **First**, **Previous**, **Next** and **Last** commands display the indicated record (first, previous, next or last) based on the order of the records shown in the **Browse By** pull-down menu.

The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.

First—Displays the first record according to the **Browse By** order.

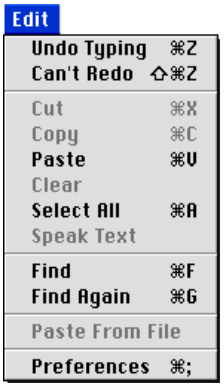
Previous—Displays the previous record according to the **Browse By** order.

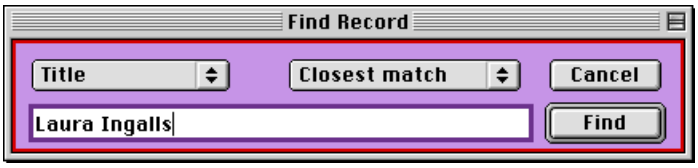
Next—Displays the next record according to the **Browse By** order.

Last—Displays the last record according to the **Browse By** order.

Finding Records

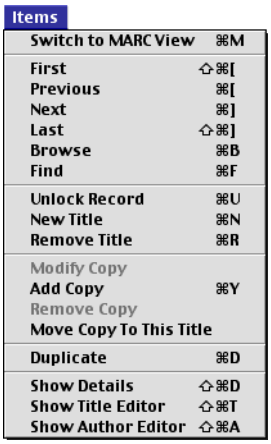
The **Find** command under the **Edit** menu can be used to locate a specific record. For example, if your are looking for an item with a title starting with the word "Biographical," Alexandria finds the first item record with that title and selects it as the current item shown in the **Items** window.





The first pull-down menu allows you to select where to search for the data. The second pull-down menu allows you to select **Closest match** or **Exact match**.

Click the **Find** button to locate the record, or click the **Cancel** button to **Stop**. The **Find** window will automatically be set to the same selection as the **Browse by** window. If a Find is performed, the **Browse by** selection is automatically set to the same selection you entered in the Find field.



Browsing Records

Use the **Browse** command from the **Items** menu to view a quick list of items starting with the currently selected record.

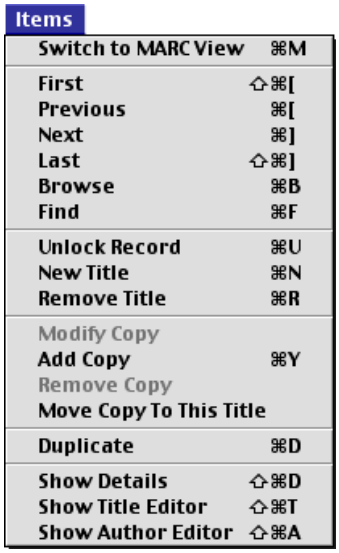
Browse items by Title
Cancel
Select
Go
More
More
Call#
Title
Author(s)
398.2 CAD Keepers Of The Earthnative American Caduto, Michael
PTA 371.9 BEN Keeping In Touch With Parents Bennett, Leatha Mae
VID 333.7 Keeping The Balance
976.9 CAR Kentucky Carpenter, Allan
330 RIE A Kid's Guide To The Economy Riedel, Manfred G 1937
791.43 THO King Kong Thorne, Ian
FIC DEL Kitty From The Start Delton, Judy
FIC DEL Kitty In High School Delton, Judy
567.9 ELD Last Of The Dinosaurs Eldridge, David
FIC FIT The Last Tycoon Fitzgerald, F. Scott
921 WIL Laura Ingalls Wilder Giff, Patricia Reilly
Laura's Desktop School
E GIF Lazy Lions, Lucky Lambs Giff, Patricia Reilly
Fic GIF Lazy Lions, Lucky Lambs Giff, Patricia Reilly
FIC COR The Lemonade Trick Corbett, Scott
811 LET Let's Pretend Bober, Natalie
817.4 TWA Letters From The Earth Twain, Mark
025.5 FRA Library Display Ideas Franklin, Linda Campbell
961 BRI Libya Brill, Marlene Targ
FIC RIC The Light In The Forest Richter, Conrad
FIC ALE Lila On The Landing Alexander, Sue

Use the up and down arrow keys on your keyboard to move the selection bar through the list. To display a new page of items, click on the More buttons on the top right of the window or use the up and down arrow key at the ends of the list. To position the browser at another item, text in the empty field to the left of **Go** button and then click **Go**.

To select an item in the list, either double-click on the item or click on the item once and then click **Select** or press <enter> or <return> on your keyboard.

When you select a record on the **Browse** window, the selected record is displayed. To leave the **Browse** window without changing the current record, click the close box in the upper left corner or the **Cancel** button.

The records displayed in the **Browse** window are sorted by any title value selected in the **Browse By** field at the top of the **Item** window. To change the order in which the records are displayed, click the arrow at the end of the **Browse By** field and choose a different value.



Changing Item Information

You can edit information directly on the **Items** window or in any of the tabs within the window. Just as you would in any other application. For example, you can place the cursor in an existing value and type additional information. You can also highlight a value and type over it. Before records can be changed, they must be unlocked by using the **Unlock** command *see "Changing Records" on page 48*.

- NOTE -

If your preferences are set to automatically lock records, you'll have to unlock the record by clicking on the lock icon or selecting **Unlock** from the **Items** menu before you can make changes to the record.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the field. To select from a pull-down menu, <tab> until the pull-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

To modify copy information, double-click on the copy line. The **Item Copy Data** window appears. When you have modified the copy information you want to change, click **OK** to return to the **Items** window.

NOTE:

Copy changes are not saved until the entire item has been saved.

When you have modified all the record information you want, click the **Save** button in the upper right of the window. The record is now saved. If you want to ignore the information you have entered, click **Revert** to display the prior record and discard your changes.

If you try to select another record or leave the window without saving your input[1], the following warning message appears.

Message
The current record has not been saved. Do you wish to save it before viewing another record or window?
Cancel
Discard
Save

Click the **Cancel** button to return to the window with your changes still intact. Click the **Discard** button if you want to ignore the data you've entered. Click the **Save** button or <enter> to save your changes.

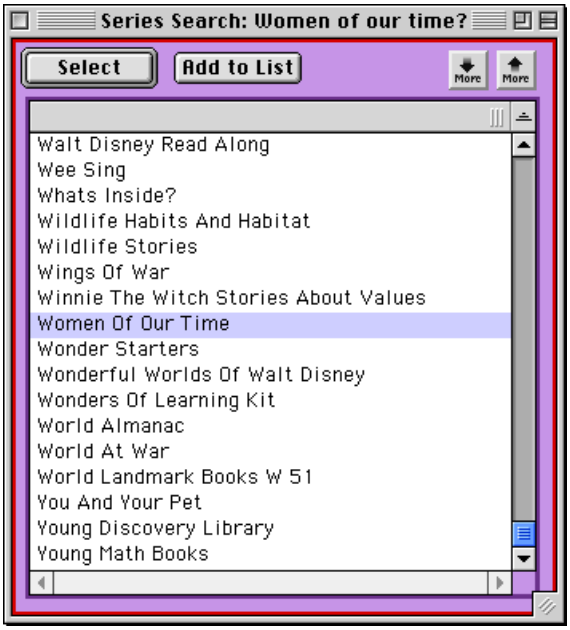
1. You can set a preference to automatically save changes. See "Automatically Save" on page 79 for more information.

Authority Control

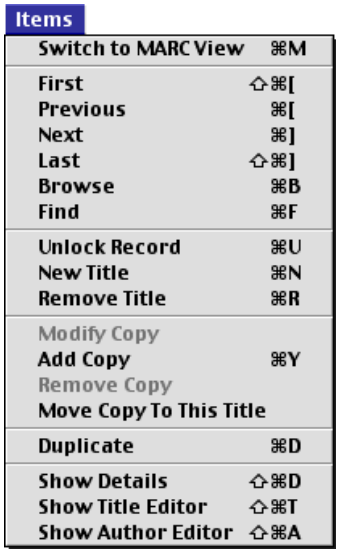
Authority Control is available for the following Item fields: Title, Authors, Publisher, Series, Subject Terms, Categories (Bibliography, Curriculum, Interest), Copy Collection and Copy Location *(see "Item Management Preferences" on page 83)*.

When Authority Control is enabled, every time the user tabs out of an Authority Control field, Alexandria checks to see if the current data has been defined before. If it has, the cursor moves to the next field. If it has not, an Authority Control selection list appears. The user can choose to add the current entry, or select a previous entry by double-clicking on the selection.

When Authority Control is not enabled, the user can still check their entry by exiting the field with an <option–tab> on Macintosh or <ctrl–tab> on Windows. If the term is not set, the Authority Control selection list appears. If the term *is* set, the cursor moves to the next field.



The example above is a Series Authority Control window. It gives a list of terms close to the one in the current entry field. The user can select an item in the list by double-clicking on it or by clicking the **Select** button. If the new term isn't in the system (but is valid) the user can add it by clicking **Add to List**.



Adding New Titles or Copies

Use the **New Title** command to add a new Title to your database. When you select the **New Title** command, the **Items** window appears with blank fields for you to add information.

Type over the prompts in the window (such as Call Number, Title and so forth) to add a new record.

To move to the next data field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select which data entry field to edit, click on the field. To select from a pull-down menu, <tab> until the pull-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

A Title is required to add a new item. Items may be added with or without copies.

Use the **Add Copy** command to add new copies for this title. Remember, copies are part of the title record and are not saved until the title is saved.

When you have added all the information needed for this item, click the **Save** button in the upper right of the window. If you want to discard the information you have entered, click the **Revert** button.

Removing a Title or Copy

Items that have been discarded, given to other libraries, sold, or permanently lost must be removed from the system to keep reports and searches from becoming cluttered with obsolete information. However, be certain that the items you are removing from the system have been permanently expunged from your collection.

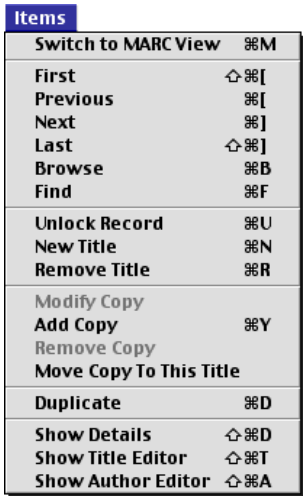
For example, a lost item may eventually be found or returned. In this case, it is better to record specific items as Lost, Discarded, On Repair, On Order, or Archived. These special item categories allow you to keep track of items that may eventually return to your library. Only remove those items that will never return to your collection.

Use the **Remove Title** command to permanently remove the current title and all its copies.

When a title is removed, all associated information is also removed. A title that has a copy checked out to a patron can not be removed. Copies that are checked out to the Lost, Discarded, On Repair, On Order or Archived patrons can be removed. The **Remove Copy** command removes the selected copy record.

W A R N I N G !

Removing items is permanent and cannot be undone. If you remove an item in error, you will have to re-enter the information or recover the information from a backup copy of your data. If you need to report on items that are lost or discarded for the year, you should check those items out to the corresponding Special Patron. Run all necessary reports (such as Super Summary or Special Item lists) before removing these items. Once they are removed, they are unavailable for any other reports.



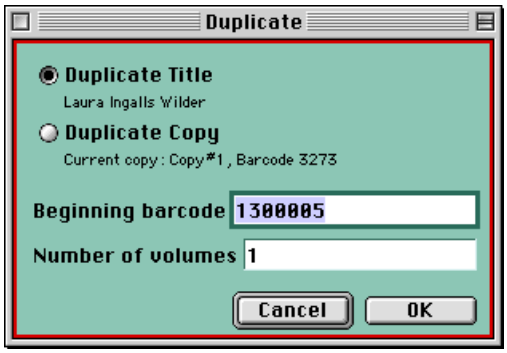
Move Copy to this Title

Use this feature when a copy is mistakenly imported or added to another title but should be on this title. Enter the barcode and click **More**. If the copy being moved is the last copy on the previous title and you would like that title to be removed automatically, leave the **Remove source titles with no copies** box checked.

Duplicating an Item

Use the **Duplicate** command to make a copy of an existing title. You can then modify the information to create a new item. This saves data entry time when you are adding items that have similar information such as author, publisher and series.

When you select the **Duplicate** command, the **Duplicate Item** window appears.



Click one of the selection buttons to choose to add **Duplicate Title** or **Duplicate Copy**.

Alexandria automatically displays a barcode number based on the value you entered in the **Next Barcode** field in the Item Management preference window *see "Item Management Preferences" on page 83*. Clicking **Duplicate Copy** changes number of volumes read as number of copies. Enter the number of additional copies you need on this title. You can type over this value to change it.

Type over the value in the **Number of volumes** field if the title you are duplicating has more than one volume. Each new title will be assigned a new volume number.

After you enter the information on this window, click **OK**. A progress window appears to show the record is being duplicated.

If you chose to duplicate the title, the **Items** window appears with a copy of the current title. Type over values on this window to create your new title.

If you chose to duplicate a copy, the **Items** window appears with the duplicate copy added. Double-click the new item copy if there are values you need to edit.

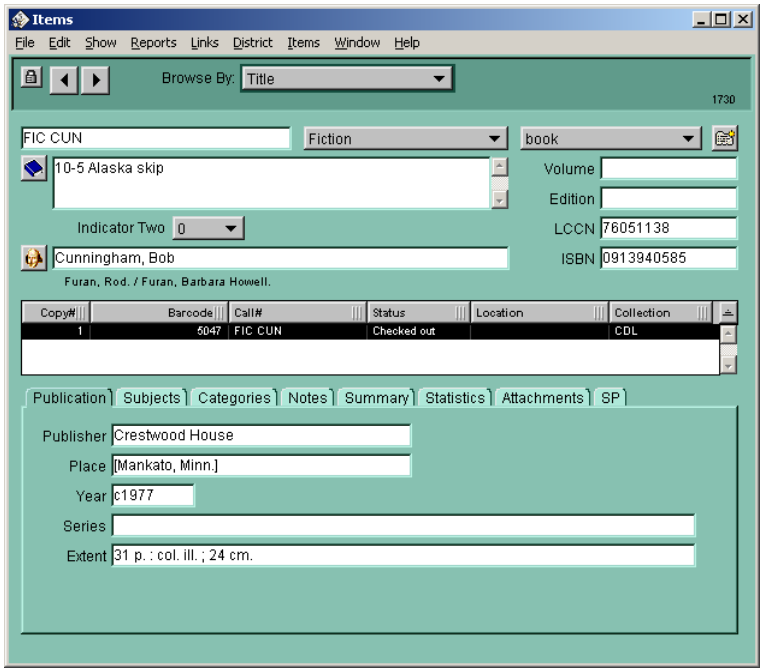
Be sure you edit all the fields to reflect the correct information for the new item. If you forget to change a particular field, the new item will have the same information as the previous item which was duplicated.

Show Details

The **Show Details** selection on the Items menu brings up the same window as the **Details** button on the Circulation window.

Item Information Fields

The **Items** window includes three major parts: the primary item information, the copy information, and the tabs.



- NOTE -

Alexandria updates the Marc record with the information you enter on the **Items** window.

Primary Item Information—The top portion of the window shows the primary information such as Call Number, Policy, Medium (formally called the General Materials Designator—GMD, or media type), Title and Author. This portion of the **Items** window is visible regardless of the tab you have displayed at the bottom of the window

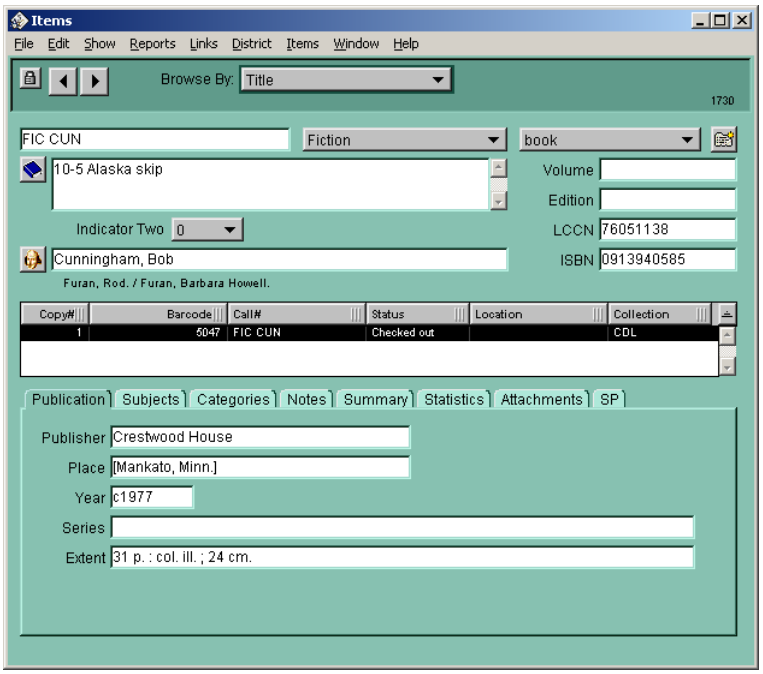
Copy Information—The middle portion of the window shows information about each copy of the title.

Tabs—The bottom portion of the window shows tabs that you click on to display more information about this item.

The following section describes fields contained within the Items window. When a field has an obvious meaning or use (such as City or Phone) it is not documented unless there is a special note about how it is used.

Primary Item Information

The top portion of the **Items** window contains primary information about the item. This includes the Call Number, Policy and Medium type, as well as Title, Author, Volume, Edition, ICCN and ISBN.



The fields in the top portion of the **Items** window are as follows.

Title Call Number—Each title is assigned a call number. The call number designates the location of an item in the library. Because call numbers are site-specific rather than universal (such as LCCN and ISBN), you must enter call numbers specific to your library. The Title Call Number is saved in Marc Field **900_a**.

Depending on their source, imported Marc records may or may not include a call number for your item. Alexandria formats call numbers to remove control characters and double spaces, thus correcting incorrectly formatted numbers.

Copies "inherit" the title call number unless a specific copy call number is changed.

Item Policy—The policy determines the Circulation rules for a particular group of items. Every title is given a policy. In addition to specifying Circulation rules, the item policy is used to group items for statistical analyses and reporting purposes.

Copies "inherit" the title policy unless a specific policy is assigned.

Medium—The medium identifies the type of title record. The pull-down menu lets you choose from existing mediums that have been used so far in your library. The default is **Book**. The medium is saved in Marc field **245_h**. You can create a new medium by selecting **Add NEW medium** in the medium pull-down menu.

Volume—The volume field distinguishes multiple-volume works such as encyclopedias, certain periodicals, and books. Enter only a number in this field (the word **Volume** automatically appears when volume is referenced on an Alexandria window).

If the item isn't part of a multiple-volume work, leave the field blank. The Volume is saved at Marc Tag **092_v** or **440_v**.

Edition—Enter edition information as you want it to appear in reports. For example, "`2nd Ed.`" or "`2nd rev. Ed.`" The edition is saved in Marc Field **250_a**.

LCCN—Enter the item's Library of Congress Control Number. The LCCN is a unique 8-digit identifier assigned to an item's bibliographic record. You may enter the LCCN with or without punctuation, however, only numeric digits are saved. Saved in Marc Field **010_a**.

ISBN—Enter the item's International Standard Book Number. The ISBN is a unique identifier. A title may have more than one ISBN (e.g., the ISBN for the hardback edition differs from the paperback edition). Alexandria only displays the first ISBN found in the Marc record. Saved in Marc Field **020_a**.

You can enter an ISSN rather than an ISBN. If the number you enter is 8 digits, Alexandria assumes the number is an ISSN and saves it at Marc Field **022_a**. If it has 10 digits, Alexandria assumes it is an ISBN.

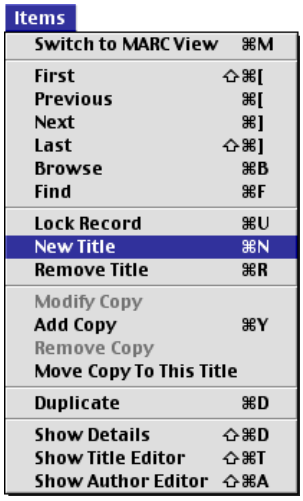
- NOTE -

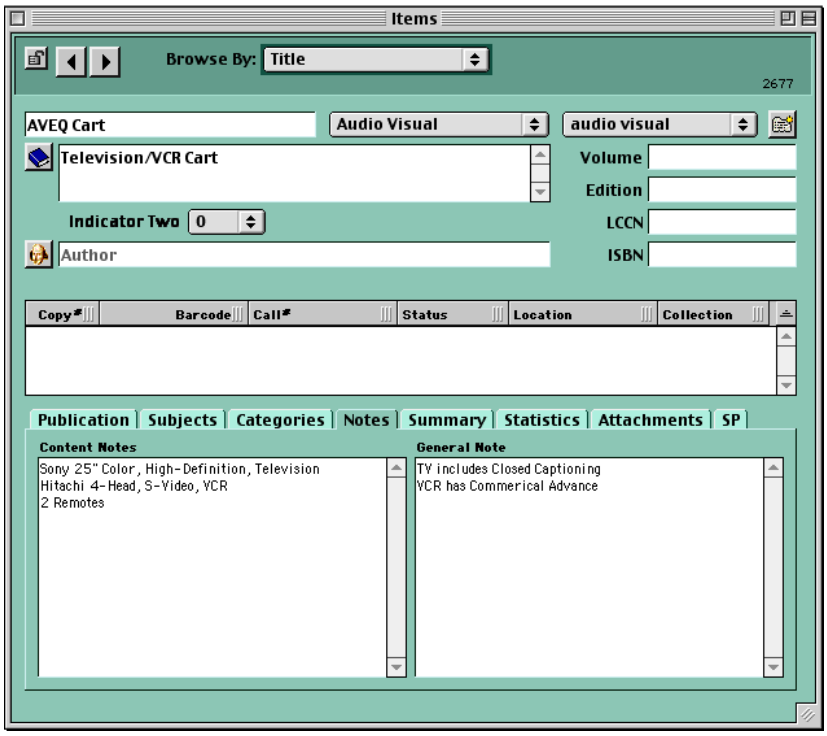
If you enter an invalid ISBN number, a question mark (?) appears at the beginning of the number to indicate it is not a valid number.

Adding Audio Visual Equipment

Your library might prefer to circulate audio visual Carts that include specific items as one *group* and barcode. Then again, it might require Patrons to check out individual items (i.e. VCR's and Televisions) separately. Regardless of how your library functions, there are several ways you can add or check out Audio Visual Equipment using Alexandria[1].

To add Audio Visual equipment to your database, go to **Show**, **Items**, then **Items**, **New Title**. You must enter a default **Call Number** (i.e. AV, AVS, EQ, EQU, *see "Super Summary Call Number Prefix definitions" on page 327*), **Policy** (Audio Visual), **Medium**, and **Title**.





If you are creating an AV Cart (or group), then you can detail what's included with the Cart in the **Content Notes** field and specify any distinctive functionality of the equipment in the **General Note** window. When you print this Cart's barcode, you may want to print several to place on each item contained within.

If you have several AV Carts with similar equipment, you can **Add Copies** just as you would with books. However, be sure to detail any differences in the Item's **Copy Notes**. For example, you might have five AV Carts with exactly the same television and two more with completely different brands/makes/models. Make sure to list any relevant **Alert Notes** for items that a patron/teacher might forget (i.e return the remote controls).

If you are adding all AV equipment as separate components, you only need to create a **New Title** for every television, VCR, slide projector, or Compact Disc player you have in your inventory so that they each have their own unique barcode. Even if you are using the AV Cart method, it is still a good idea to barcode each component individually for inventory purposes.

1. Remember to be consistent in how you circulate audio visual equipment using Alexandria. There is not *one* set way to do this, it's essentially up to you and your library.

Title Editor

Alexandria includes a Title and Author editor under the **Items** window. This feature allows Marc savvy librarians to easily select what Tags and Subfields they would like to use to enter information, without having to use an actual Marc editor. The subsequent sections first explain how to enter Marc record information in the Title and Author fields, and is then followed with a description on how to use the **Title** and **Author Editor**.

Title—A title is required; the record will not be saved unless you enter a value in the **Title** field. The title is saved under Marc Field **245_a**.

In the **Title** field, if you enter a title that is longer than the line, the text wraps to the next line. To enter a subtitle, press `<return>` on the keyboard and enter a colon (`"="`) followed by the subtitle. When you save the record, it is displayed with the colon and subtitle on the second line. This is saved under Marc Field **245_b**. You can also use the colon `(":")` in the **245_b** tag to designate a subtitle. However, the `(":")` is mainly for Spanish titles.

For example:

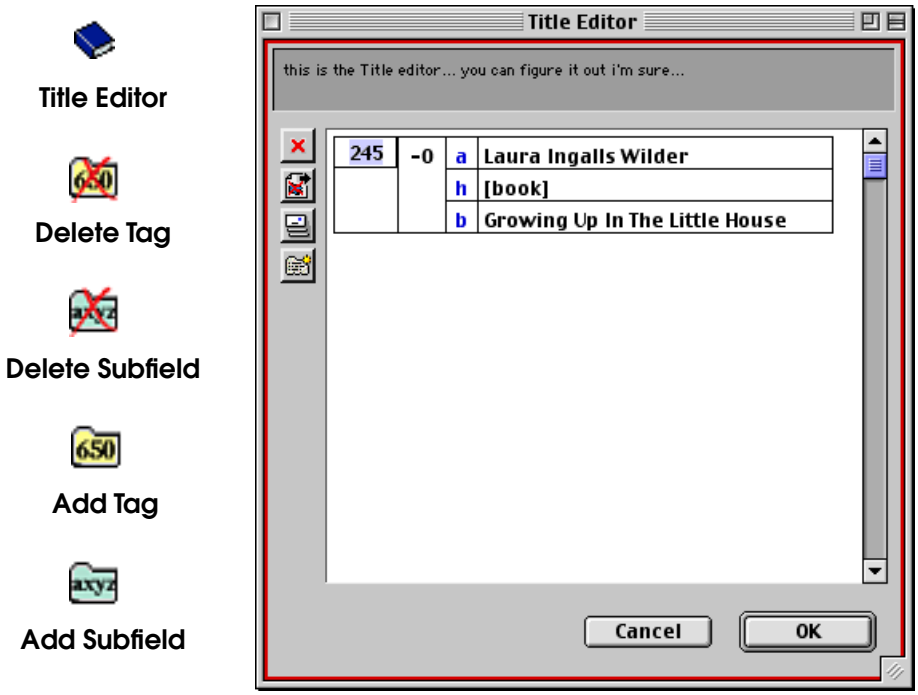
```
Laura Ingalls Wilder
: growing up in the little house
```

If you want to continue manually entering or editing Marc information from the Title field, you can enter statements of responsibility and general material designation. Begin Statements of Responsibility (**245_c**) with a front slash (`"/"`) and enclose the medium in brackets (`"[]"`). All subfield information must begin on a new line in the Title field.

If you enter a medium, it will be saved, but not shown in the title field, only in the pull-down menu. If you enter a statement of responsibility, and preferences are set to not show this, it will be saved, but not displayed. If you `<option-tab>` on Macintosh or `<ctrl-tab>` on Windows out of this field, or you have Authority Control turned on in Item Preferences, a Title Authority check window will appear, allowing you to see if this title is already in your collection. If it is, it's automatically selected and the Authority Control will not display.

Underneath the Title field is the **Indicator Two** pull-down menu with the digits 0-9. Use this drop down menu to specify the number of characters in the title to ignore when indexing the title. Thus, the title *The Wizard of Oz* should have a "`4`" selected so the book is sorted (indexed) as "Wizard of Oz". The final character to ignore must be either a space or punctuation character. If this indicator is set incorrectly, Alexandria will revert this setting to zero rather than ignore a partial word.

If you want a quicker, easier method of editing Title Marc fields, click the **Title Editor** icon to the left of the Title field. The following window appears:



Using the **Tag** terminology learned from the previous page, enter or edit your Marc record information. The **Title Editor** allows you to easily enter multiple detailed subfields and add new **Tags** to any item title. This method of entering information is far superior to that of the Title field. Click on the four icons to the left of the **Tag** field to **Delete** or **Add Tag**s and **Subfield**s.

The order you have for **Subfield**s within a tag is saved as displayed. Tags will be saved in numerical order.

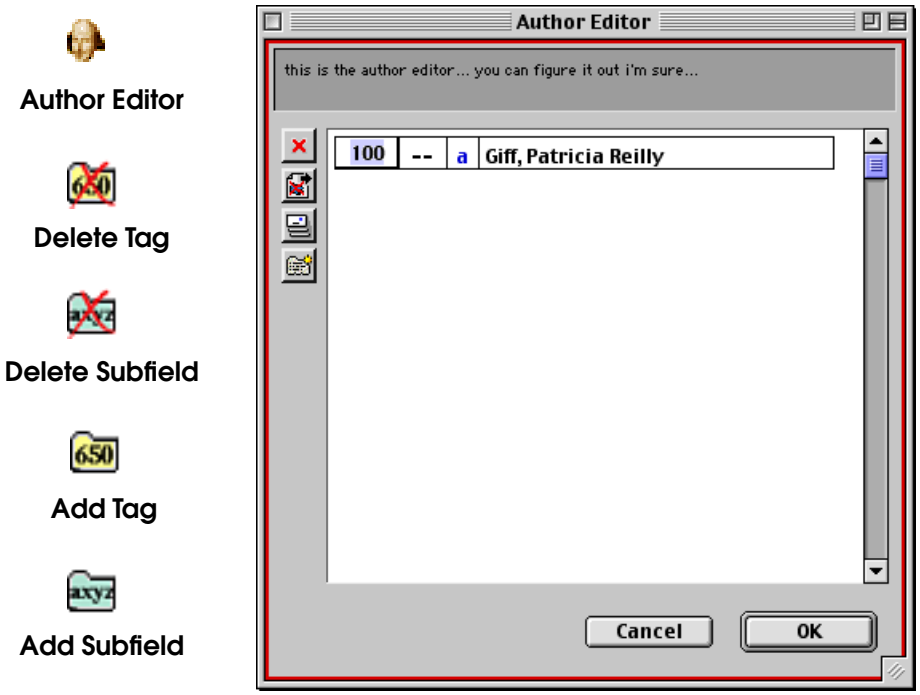
Author—Enter "`Last name, First name`" in the author field. This is the primary author saved in Marc Tag 100_a. To add/edit additional authors, use the Author Editor, or Marc editor and add them as repeating **700_a** or other appropriate tags.

If you `<option-tab>` (on Macintosh) or `<ctrl-tab>` (on Windows) out of this field, or you have Authority Control turned on in Item Preferences, an Author Authority check window will appear, allowing you to see if this author is already in your collection. If they are, the Authority Control selection list will not display.

Author Editor

When you have more than one Author, click on the **Show Author Editor** option under the **Items** menu or click the **Author Editor** icon. Use this editor to Add, Modify or Remove authors. Please note, the first Author is stored in Marc Tag **100**, additional Authors are usually stored in Marc Tag **700**.

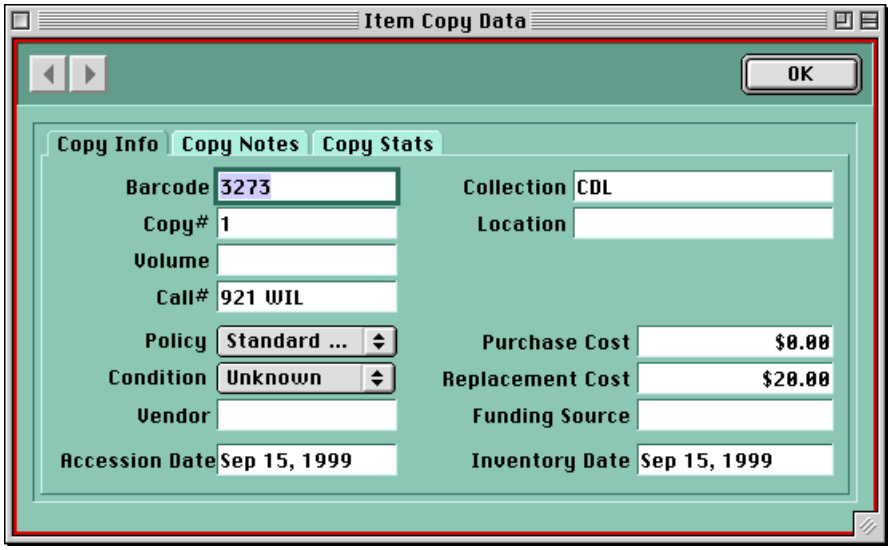
When you click on the **Author Editor**, the following window appears:



The **Author Editor** allows you to easily enter multiple detailed subfields and add new **Tags** to any item title. Click on the four icons to the left of the **Tag** field to **Delete** or **Add Tag**s and **Subfield**s.

Copy Information

The middle portion of the **Items** window shows copy information for each copy of the current title that you have in your collection. To view detailed information about a copy, double-click on the copy in the list. The **Item Copy Data** window appears.



This window includes tabs with various kinds of copy information. Click on a tab to view the information in the tab window.

The following sections describe the information on each tab window.

Copy Info

Barcode—Each copy has a unique barcode number. Barcodes can be up to 15 digits. Alexandria assigns these numbers based on the value you enter in the Item Management preference window. You can type over the number to change them. The copy barcode is shown at **852_p** in Marc records.

Copy #—Alexandria assigns each copy a number when it is added. You can type over the copy number to change it. Duplicate copy numbers are allowed. The copy number is simply an alternative identification number for the library's use. Alexandria uses the barcode number to uniquely identify copies. If you import items, the copy number will not change, even if the number is already used by another copy in the system. The Copy number is shown at **852_t** in Marc records.

Call #—The call number for a copy is "inherited" from the title Call Number unless it's replaced with a Copy-specific call number. The Copy call number is shown at **852_h** in Marc records.

Volume—The volume for a copy is "inherited" from the title Volume Number, unless it's replaced with a Copy-specific volume number. The Copy Volume number is shown at **852_v** in Marc records.

Policy—The Copy Policy is "inherited" from the Title Policy unless it's changed by the librarian.

Condition—Allows the librarian to specify a condition for the copy. You can create a report to track copies by their condition.

Vendor—Allows the librarian to specify the vendor from whim the copy was obtained.

Accession Date—This is the date the copy was entered into Alexandria. The default for this field is the current date. You can generate reports and search based on this accession date.

Collection—This code specifies which collection a copy is associated with. Typically, this is used only for multi-collection systems. The Collection is shown at **852_a** in Marc records. When this value matches the collection code for your library, its considered part of your library collection. The library ID code on the Library preference window is used as the Collection code for all copies in your library.

Location—This information appears at the Research Workstations to help the patron find an item. Patrons look for items in your library by call number. If you have items outside the library or in an unusual place in the library, enter the location here. For example, you might enter "`Computer Lab`" for computer disks or "`Music Room`" for audio tapes. The Location is shown at **852_b** in Marc records.

Purchase Cost—The cost is used for recording purchase costs of the copy. If you do not enter a cost, Alexandria uses the Item policy's default average for determining the cost of an item. The Copy Cost is shown at **852_9** in Marc records.

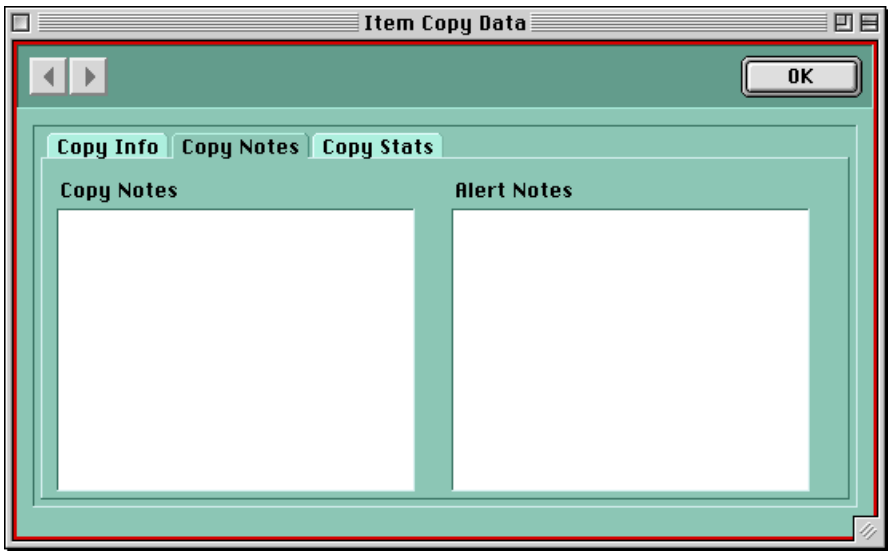
Replacement Cost—In many libraries, patrons are charged a replacement cost for a lost item rather than the library's purchase cost. The Replacement Cost defaults to the Purchase Cost, but can be later modified by the librarian as replacement costs change.

When the "value" of a copy is required, Alexandria first checks to see if a Replacement Cost is available. If the Replacement Cost is $0.00, then Alexandria checks to see if a Purchase Cost is available, if that's also $0.00 then Alexandria tries to use the Average Replacement Cost of the copies policy. If that value is also `$0.00`, then a value of `$20.00` is used.

Funding Source—This identifies the funding source for the copy. It can be used when you generate reports, including reports that list all items purchased from a specific funding source.

Inventory Date—This is the date the copy was last inventoried or circulated. Alexandria automatically inventories items when they are circulated. You can print a report of all items that haven't been circulated (inventoried) since you last inventoried your collection, then inventory only those items.

Copy Notes



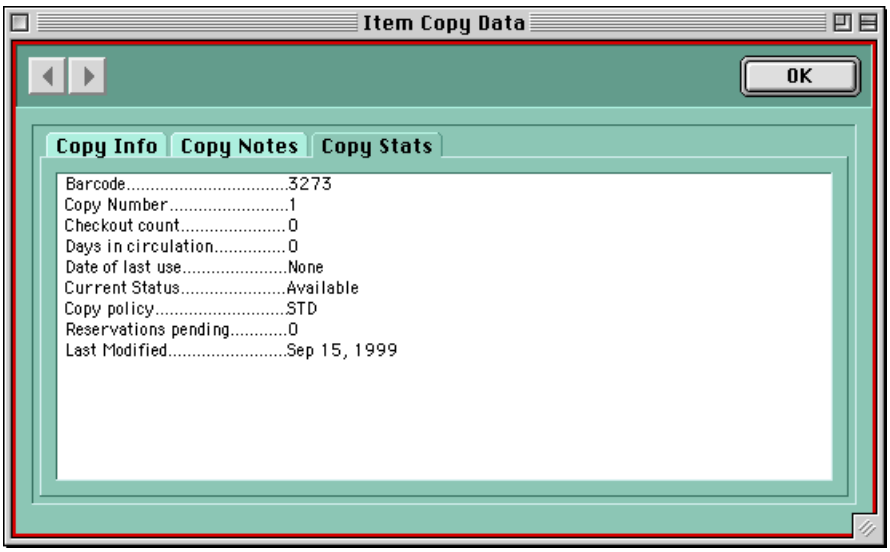
Copy Notes—Enter general comments about this copy. When an item has copy notes, a **Notes** button appears in the Current Item section of the **Circulation** window. For example, if a copy is damaged, you can document the damage in this field. Click the **Notes** button to view the copy notes. The Copy Notes are shown at **852_z** in Marc records.

Alert Notes—This field is used to make the librarian aware of special circumstances regarding a specific copy. When a copy circulates with multiple parts, the **Alert Notes** will remind on check out and check in that it includes multiple parts. When the copy is accessed from the **Circulation** window, an alert note appears. The Alert Note is shown at **852_x** in Marc records.

If a copy has *any* notes at all, two plus signs (`"++"`) appear next to the item name in the Current Item section of the **Circulation** window. Enter the `"++"` command on the command line to view that item's copy notes.

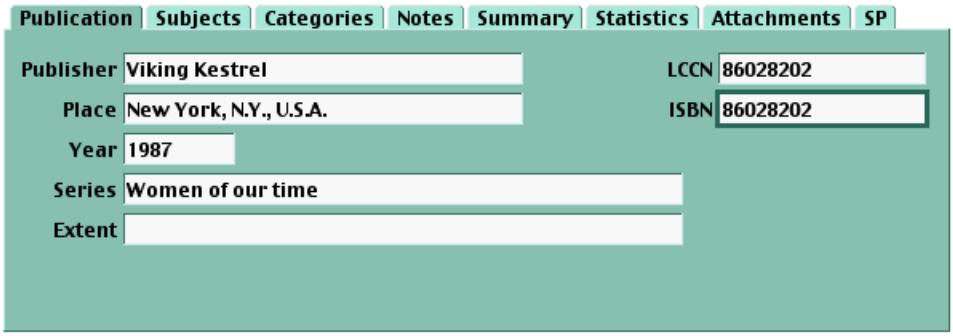
Copy Statistics

The **Copy Stats** tab includes statistics about the item's use. Alexandria automatically generates this information and you cannot modify it. This screen also includes the item history, the names and barcodes of the last three patrons who borrowed this copy.



Title Publication

The data fields in the **Publication** tab contain item publication information.



Publisher—Enter the name of the publisher. Saved in Marc Field **260_b**.

Place—Enter the place of publication. Saved in Marc Field **260_a**.

Year—Enter the year of publication. Omit ending punctuation. Estimated dates are enclosed in brackets. Saved in Marc Field **260_c**.

Series—If the item is part of a series, enter the series name here. Otherwise, leave this field blank. Saved in Marc Field **440_a**.

If you `<option-tab>` on Macintosh or `<ctrl-tab>` on Windows out of this field, or you have Authority Control turned on in Item Preferences, a Series Authority check dialog will appear allowing you to see if this series is already in your collection. If it is, the Authority Control selection list will not be displayed.

Extent—Enter physical information about the item, such as the number of pages, total playing time, number of slides, illustration information and so forth. You can specify which subfield the extent data is saved in by following AACR2 rules of punctuation.

300_a (Extent), has no proceeding punctuation.

300_b (Other Physical Details, such as illustration info), preceded by a colon.

300_c (dimensions), preceded by a semicolon.

300_e (Accompanying Material), preceded by a plus sign.

For example: `300_aFilmstrip_bColor_c35mm_eSound cassette.`
is shown as: "Filmstrip: Color; 35mm +Sound cassette."

Another example: `300_a161 pp._c22 cm._e161 pages with ills.`
is shown as: "161 pp.; 22 cm.+161 pages with ills."

Subjects

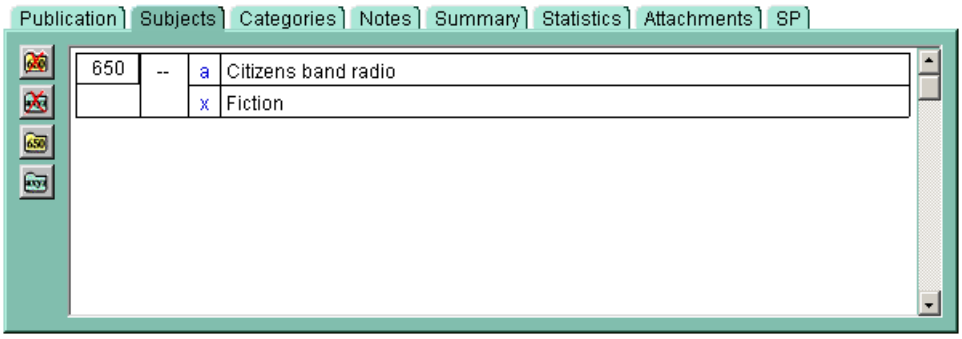
Delete Tag

Add Tag

Add Subfield

Delete Subfield

This tab leads to the **Subject Editor** and defines the item's subject entries.



The **Subjects** tab allows the user to catalog these subjects:

650 General Topic

651 Geographic

Each new subject you add will default to the **650 _a_x_y_z**. You can change the tag only to those listed above. Any others can only be added from the Marc view. You can also change any tag or subfield as desired. Tags will always sort in numerical order when the title is saved. Subfields save in the order they are displayed or entered. There is no sorting for Subfields.

Information that you enter in this window is used when patrons search the collection. For example, if you add "Mythology" in the **650_a** column, patrons can search the collection for "Mythology" and this item will be included in the results.

The subjects you enter must have at least two characters and can be a single word or phrase. Click in the different Subject categories to edit subfields.

To remove a subject, highlight it and press the <delete> key on your keyboard or use the **Delete Tag** icon to the left side of the **Tag#** field.

The Subjects tab allows the librarian to edit and create any **Tag**. For each **Tag** you add, a separate line is created with the Topical data at **_a**, the General data at **_x**, Chronological data at **_y** and Geographic data at **_z**.

General Topic (_a)

Geographic (_x)

Chronological (_y)

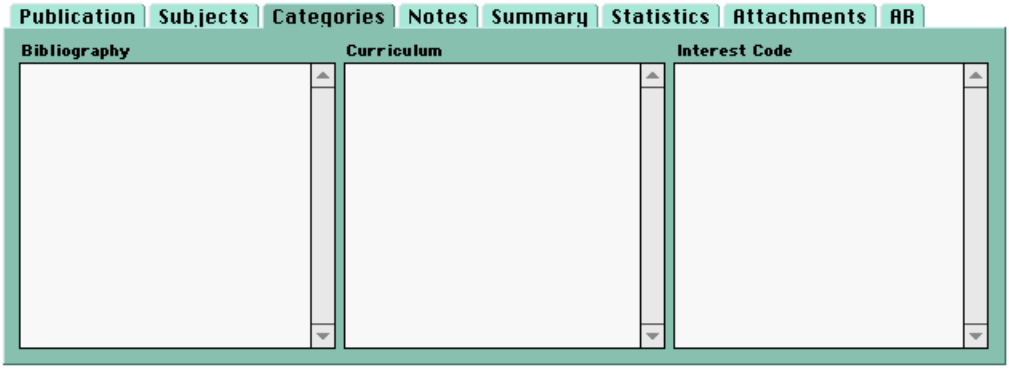
Geographic (_z)

- NOTE -

Every term in Marc subject fields are cataloged by Alexandria and can be searched by Alexandria Researcher.

Categories

This tab provides a way to group items into custom categories specific to your location. Category groupings make it easier for patrons to access related items in your collection.



When you add text to the categories in this window, patrons can search the text and find items in your collection. For example, you can create a group in the **Curriculum** column for a particular teacher's class. You can then catalog the books for that class with that **Curriculum** value. When students search on the curriculum group, the search results will display all the books required for that teacher's class.

Bibliography—Used to create bibliographies of interest to patrons. An item may belong to several different bibliographic categories. Since this is an Alexandria-defined field, it's not displayed in the Marc editor.

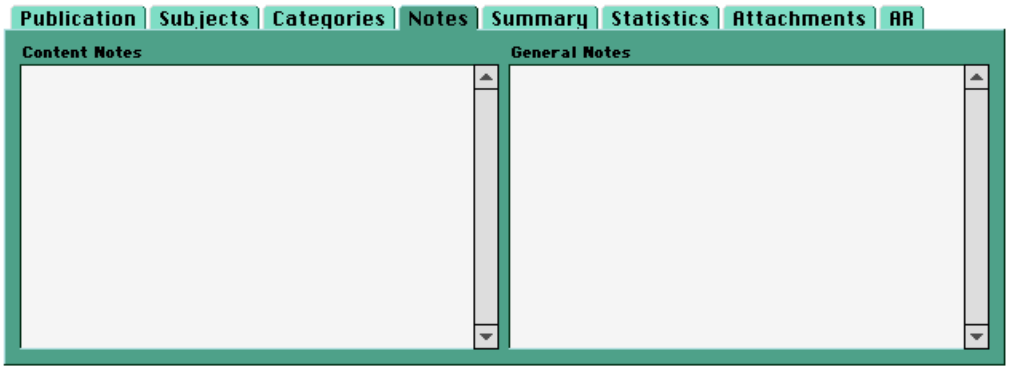
Curriculum—Contains curricula information for a title. For example, items that Ms. Andres is using in her Geography 212 class can include Curriculum categories such as "`Geography 212`" and "`Ms. Andres`". From the Alexandria Researcher, students can search for the items by the teacher or course name. Reports can be sorted by Curriculum. Since this is an Alexandria-defined field, it's not displayed in the Marc editor.

Interest Code—Contains information regarding the item's intended audience. Be consistent in how you enter the values in this field and be sure your patrons know what values to search for (e.g. if you enter "`8th grade`" as an interest category, be sure your patrons know to enter "`8th grade`" rather than "`Eighth Grade`").[1] Interest Level data is saved in Marc Tag **521_a**.[2]

1. The interest code is not always so specific. Another example would be `7-10` (meaning age) or `Junior High School` to `College Students`.
2. Depending on the Marc indicator, it can be more specific. **521 00_a** could be reading level [3.4]. 521 10_a could be interest age level [7-10]. **521 20_a** could be interest grade level [K-3].

Notes

This tab contains content and summary notes.

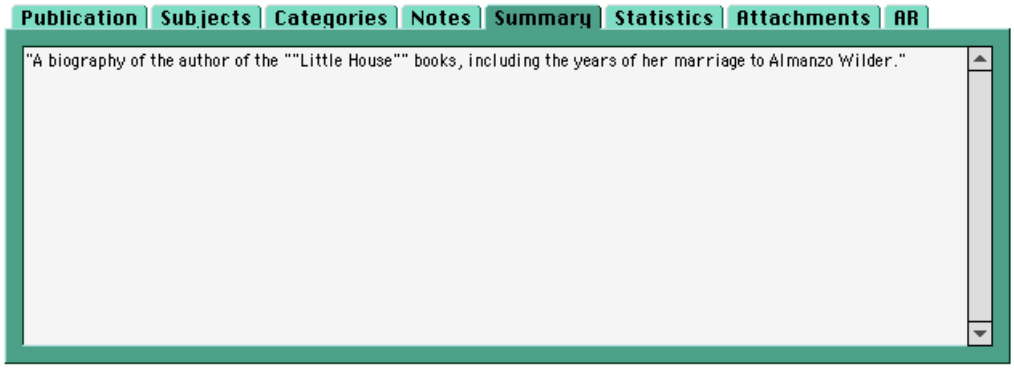


Content Notes—Contains notes about the item's content. For example, a Content Note for an anthology may list the works included within the anthology.

Separate contents by pressing the <return> key. Only the first **505_a** content note in the Marc record is displayed in this window.

General Notes—Contains the first General Note for this title.
Only the first **500_a** note in the Marc record is displayed in this window.

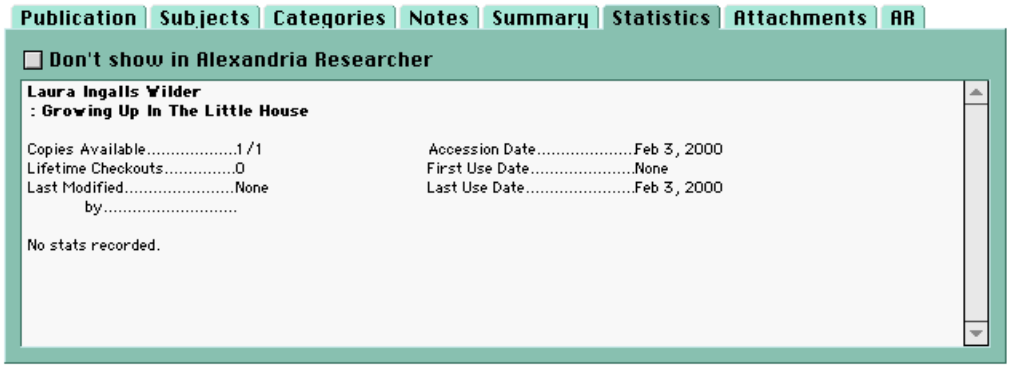
Summary—Contains a summary of the item. The summary appears in the item detail screen and can be viewed for easy reference. If a patron knows what a book is about but not the title or author, the patron can search for the item by words in the summary.



Only the first **520_a** summary note in the Marc record is displayed in this window.

Statistics

The **Statistics** tab shows information that is collected automatically during Circulation. This information helps assess library and item usage. It can be used for ordering additional copies of items in high demand or weeding out infrequently used items. The information displayed is a summary for all copies, and cannot be modified.



If you have a multi-collection Alexandria License, and are using the District Librarian Client, an additional window will be visible showing all the collections available in your database. Each collection has its own Statistics information.

Don't Show in Alexandria Researcher—Use this check-box if you don't want an item to show when a patron does a search. When you search from the Librarian Workstation and this item is found, it is displayed in the results list followed by an asterisk ("*"). This informs you that it's in the collection, but patrons will not be able to see it in their results lists. This setting is for all copies from all collections within the database.

Attachments

The **Attachments** tab shows documents, videos, URLs and other items that are attached to the item record. Item attachments also appear on the **Details** window when an item is found through a search. The patron can click an attachment to view or launch it from the **Details** window.

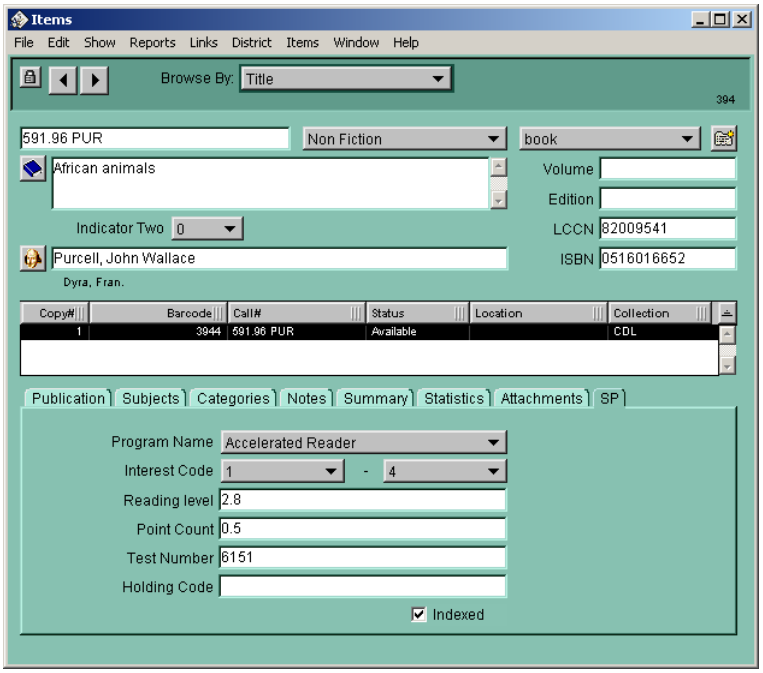
You may attach URLs, Files, Sounds or Movies by dragging their icons to the attachment list or clicking on the associated icon and selecting the file. To add an URL, click on the icon and enter the full URL.

Double-click on any item in the list to edit the attachment specifications. <Option>-double-click (Macintosh) or <ctrl>-double-click on any item in the list to view the original document or URL.

When you have added attachments, click the **Save** button at the top of the **Items** window to save the attachments. To remove an attachment, select the attachment in the list and click **Remove** or press the <delete> key.

SP

The **SP** tab (Study Program) is used to record information for special programs such as **Accelerated Reader** and **Reading Counts**. For example, if you are using the Accelerated Reader program, select it from the pull-down menu and edit data for this entry. This data is stored in the **526** Tag according to Marc standards for study programs. If you are using a study program other than Accelerated Reader or Reading Counts, you can create your own by selecting **Other** from the pull-down menu and filling in the Study Program name in the box provided.



Program Name—Choose either a default Study Program or select **Other** to create a title for your own study program.

Interest Code—These two pull-down menus allow you to select the grade level interest range. For example, if your Study Program is for patrons with a level of 7 through 10, enter "7" in the first pull-down menu and "10" in the second.

Reading Level—This is the estimated reading level of the item (i.e. 3.4 means 4th month of the 3rd grade)

Point Count—The number of points received for passing a test on an item.

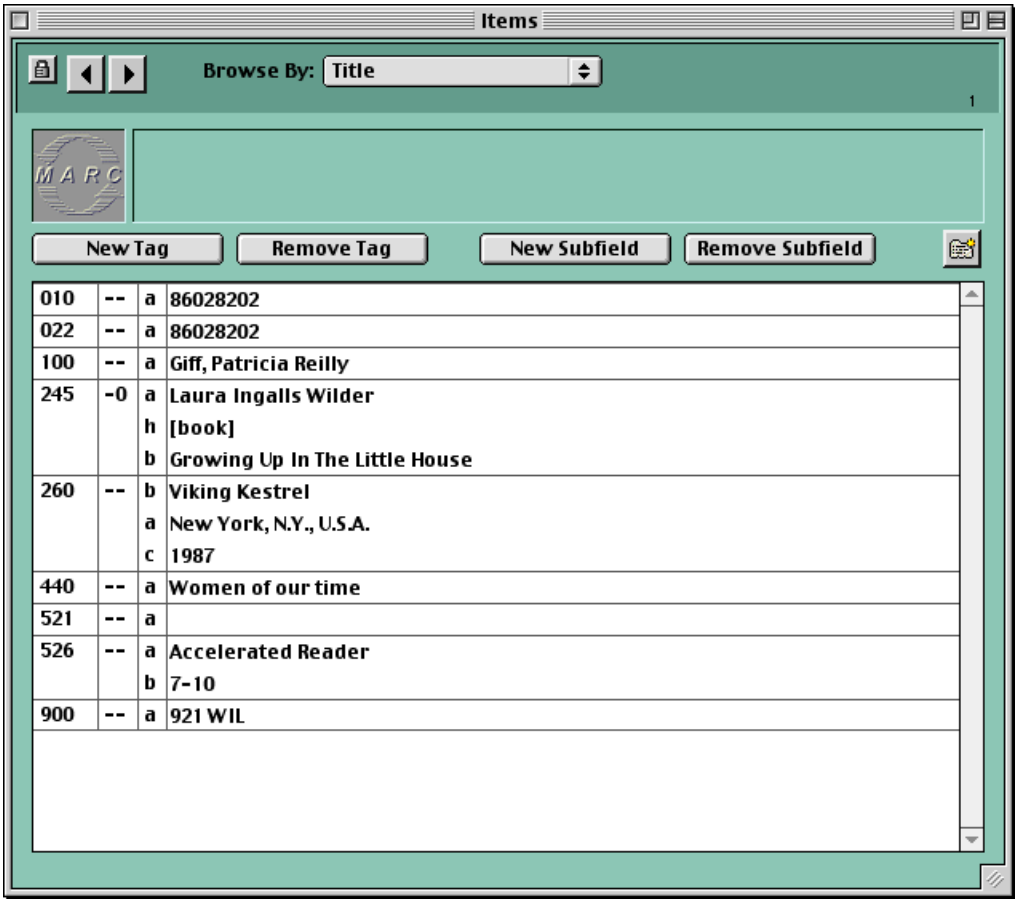
Test Number—This is the number of the test for an item.

Holding Code—This is the Location of the item (i.e. Library Code).

Indexed—This check box allows the user to indicate that they currently have the test for this item and want this information searchable.

Marc Editor

Select **Switch to Marc View** in the **Items** menu. When you do this you'll see a window like the one below, and the **Items** menu will now appear as shown to your left.



010	--	a	86028202
022	--	a	86028202
100	--	a	Giff, Patricia Reilly
245	-0	a	Laura Ingalls Wilder
		h	[book]
		b	Growing Up In The Little House
260	--	b	Viking Kestrel
		a	New York, N.Y., U.S.A.
		c	1987
440	--	a	Women of our time
521	--	a	
526	--	a	Accelerated Reader
		b	7-10
900	--	a	921 WIL

The Marc Editor is designed to allow Marc-knowledgeable librarians the ability to modify information in the Marc record. You can Edit, Add or Remove Tags, indicators, and subfield data. The Marc editor confirms that any changes you make are syntactically correct (i.e. that they are still in a valid Marc format). However, the editor provides no checking for Marc standards in the data you enter. Although Alexandria will allow you to enter any data you like, only specific Marc data is used by Alexandria. Any additional information is retained for reference or future purposes only.

Before records can be changed, they must be unlocked by using the **Unlock** command. *see "Changing Records" on page 48*.

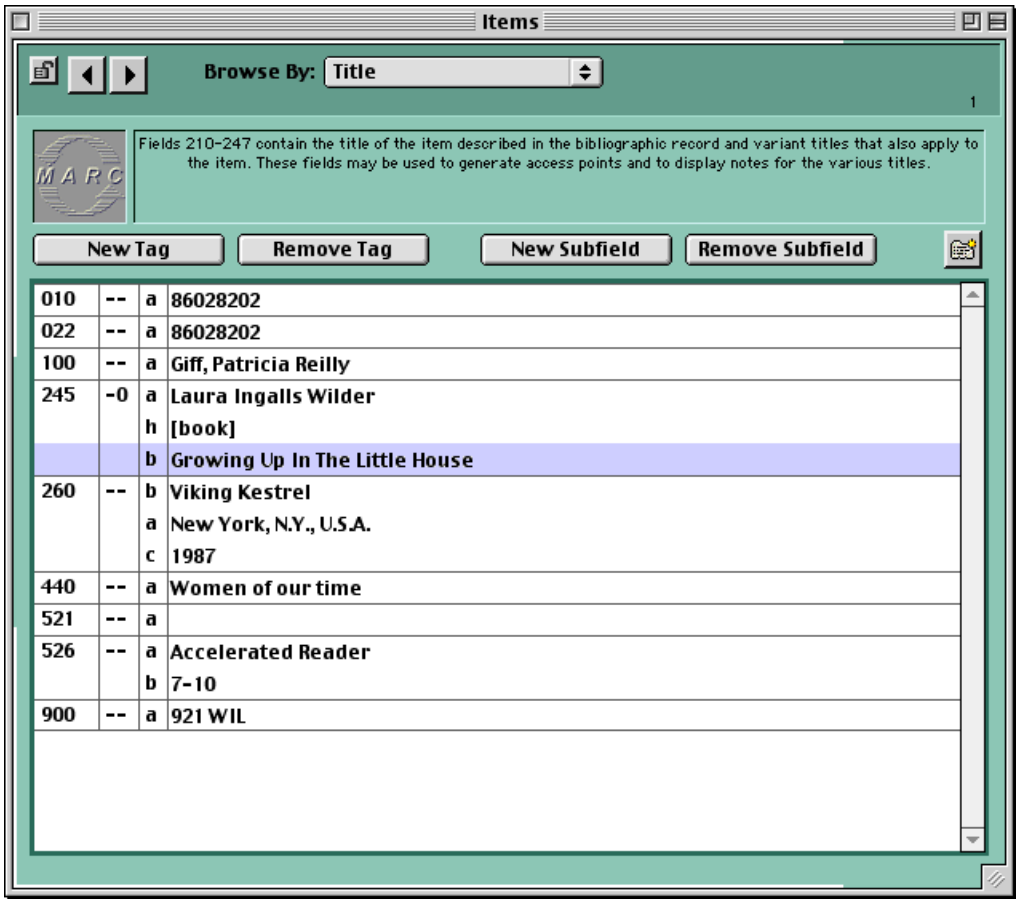
- NOTE -

Changes to the Marc record are ONLY saved if you press the **Save** button at the top of the window. If you select **Revert**, all changes are discarded and the record reverts to its previous state.

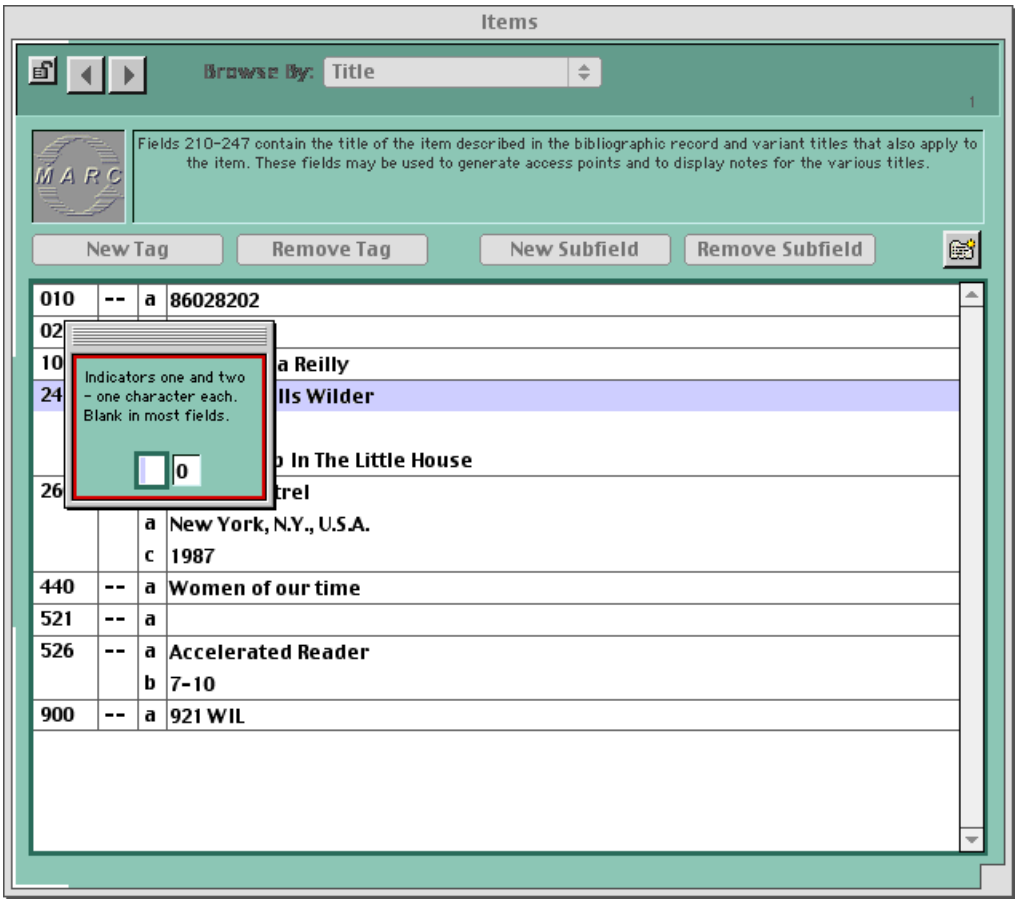
- To add a New Tag, click on the **New Tag** button. The following window appears:

In this example a new **008** Tag will be created if you click on **OK**.

- To remove an existing Tag, click on the Tag number. All the data in the Tag will be highlighted so you can see which Tag is selected. Click on the **Remove Tag** button to remove the Tag.
- To Edit an existing Tag's subfield data, click on the data. A pull-down menu will ask you to confirm that you really want the tag removed
- Subfields are shown in the third column and are limited to a single letter or number. No punctuation or spaces are allowed in the Subfield column. Use the buttons at the top to create a **New Subfield**. The data for the Subfield is shown and can be edited or entered in the fourth column.

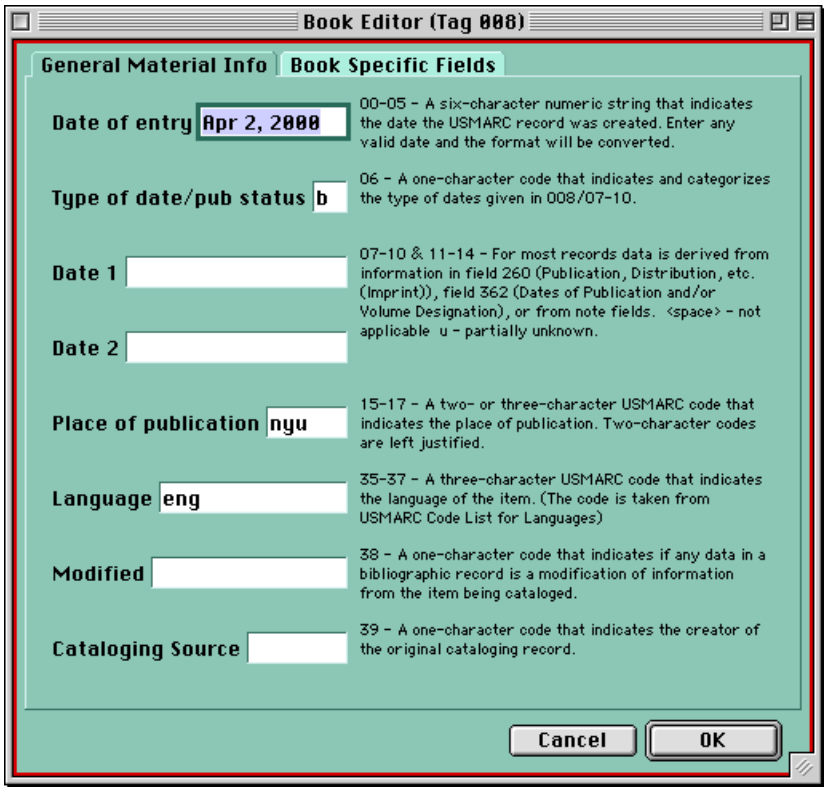

Items
Browse By: Title
1
MARC
Fields 210-247 contain the title of the item described in the bibliographic record and variant titles that also apply to the item. These fields may be used to generate access points and to display notes for the various titles.
New Tag
Remove Tag
New Subfield
Remove Subfield
010 -- a 86028202
022 -- a 86028202
100 -- a Giff, Patricia Reilly
245 -0 a Laura Ingalls Wilder
h [book]
b Growing Up In The Little House
260 -- b Viking Kestrel
a New York, N.Y., U.S.A.
c 1987
440 -- a Women of our time
521 -- a
526 -- a Accelerated Reader
b 7-10
900 -- a 921 WIL

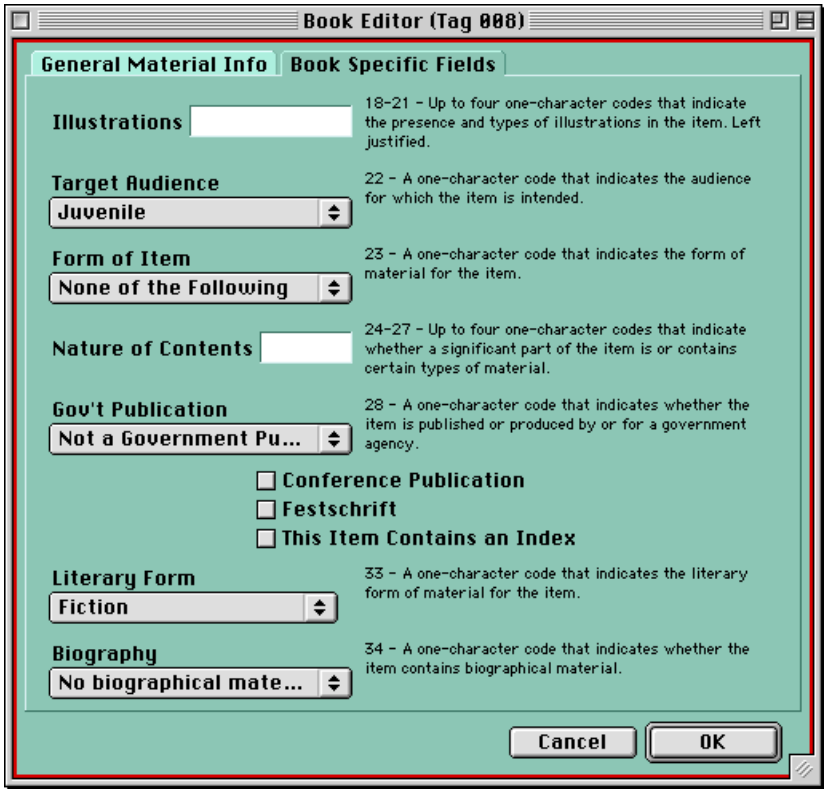
- To Edit a Tag's indicators, click on the indicator. The indicators can be modified using the following window.


Items
Browse By: Title
Fields 210-247 contain the title of the item described in the bibliographic record and variant titles that also apply to the item. These fields may be used to generate access points and to display notes for the various titles.
New Tag
Remove Tag
New Subfield
Remove Subfield
010 -- a 86028202
Indicators one and two - one character each. Blank in most fields.
0
a New York, N.Y., U.S.A.
c 1987
440 -- a Women of our time
521 -- a
526 -- a Accelerated Reader
b 7-10
900 -- a 921 WIL

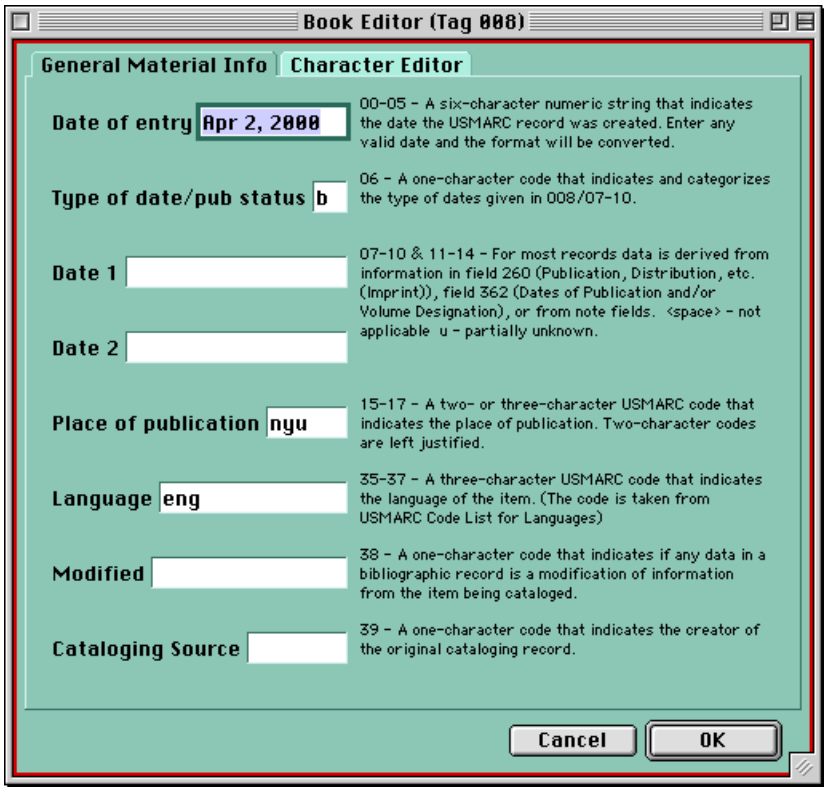
- Tags between 001 and 009 have no indicators or subfields. They can be edited as a stream of characters. A special editor is available for the **008** Tag.

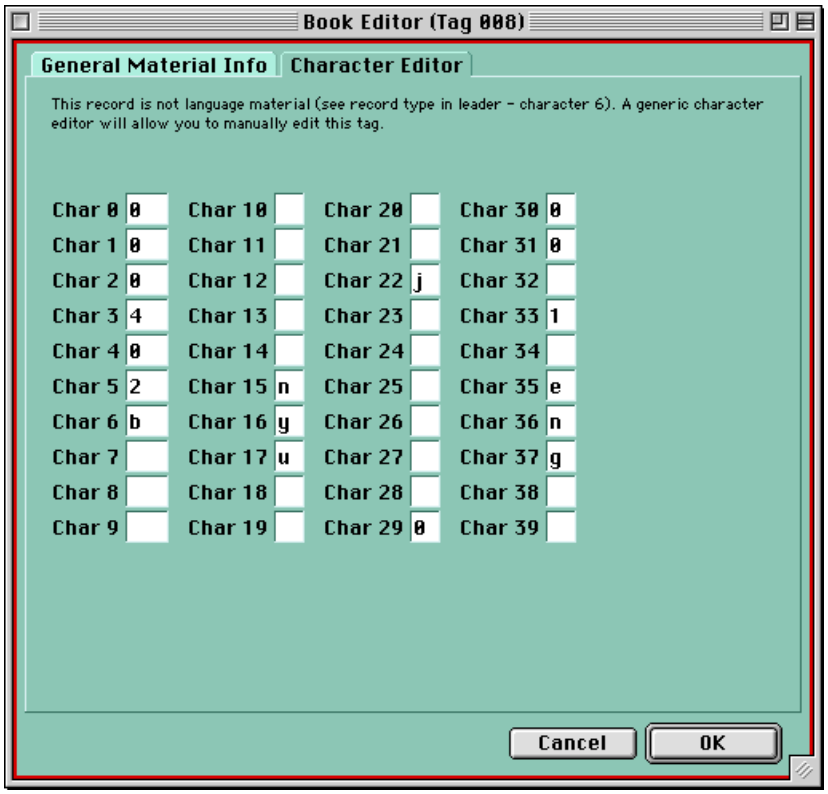
- To edit the **008** Tag, click on it. If the Record type is "a" then the following editor is available to make syntactically correct changes.


Book Editor (Tag 008)
General Material Info
Book Specific Fields
Date of entry
Apr 2, 2000
00-05 - A six-character numeric string that indicates the date the USMARC record was created. Enter any valid date and the format will be converted.
Type of date/pub status
b
06 - A one-character code that indicates and categorizes the type of dates given in 008/07-10.
Date 1
Date 2
07-10 & 11-14 - For most records data is derived from information in field 260 (Publication, Distribution, etc. (Imprint)), field 362 (Dates of Publication and/or Volume Designation), or from note fields. <space> - not applicable u - partially unknown.
Place of publication
nyu
15-17 - A two- or three-character USMARC code that indicates the place of publication. Two-character codes are left justified.
Language
eng
35-37 - A three-character USMARC code that indicates the language of the item. (The code is taken from USMARC Code List for Languages)
Modified
38 - A one-character code that indicates if any data in a bibliographic record is a modification of information from the item being cataloged.
Cataloging Source
39 - A one-character code that indicates the creator of the original cataloging record.
Cancel
OK


Book Editor (Tag 008)
General Material Info
Book Specific Fields
Illustrations
18-21 - Up to four one-character codes that indicate the presence and types of illustrations in the item. Left justified.
Target Audience
Juvenile
22 - A one-character code that indicates the audience for which the item is intended.
Form of Item
None of the Following
23 - A one-character code that indicates the form of material for the item.
Nature of Contents
24-27 - Up to four one-character codes that indicate whether a significant part of the item is or contains certain types of material.
Gov't Publication
Not a Government Pu...
28 - A one-character code that indicates whether the item is published or produced by or for a government agency.
Conference Publication
Festschrift
This Item Contains an Index
Literary Form
Fiction
33 - A one-character code that indicates the literary form of material for the item.
Biography
No biographical mate...
34 - A one-character code that indicates whether the item contains biographical material.
Cancel
OK

If the Marc record is not specified as "Language Material," then an alternative **008** editor is displayed.


Book Editor (Tag 008)
General Material Info
Character Editor
Date of entry
Apr 2, 2000
00-05 - A six-character numeric string that indicates the date the USMARC record was created. Enter any valid date and the format will be converted.
Type of date/pub status
b
06 - A one-character code that indicates and categorizes the type of dates given in 008/07-10.
Date 1
Date 2
07-10 & 11-14 - For most records data is derived from information in field 260 (Publication, Distribution, etc. (Imprint)), field 362 (Dates of Publication and/or Volume Designation), or from note fields. <space> - not applicable u - partially unknown.
Place of publication
nyu
15-17 - A two- or three-character USMARC code that indicates the place of publication. Two-character codes are left justified.
Language
eng
35-37 - A three-character USMARC code that indicates the language of the item. (The code is taken from USMARC Code List for Languages)
Modified
38 - A one-character code that indicates if any data in a bibliographic record is a modification of information from the item being cataloged.
Cataloging Source
39 - A one-character code that indicates the creator of the original cataloging record.
Cancel
OK



Circulation

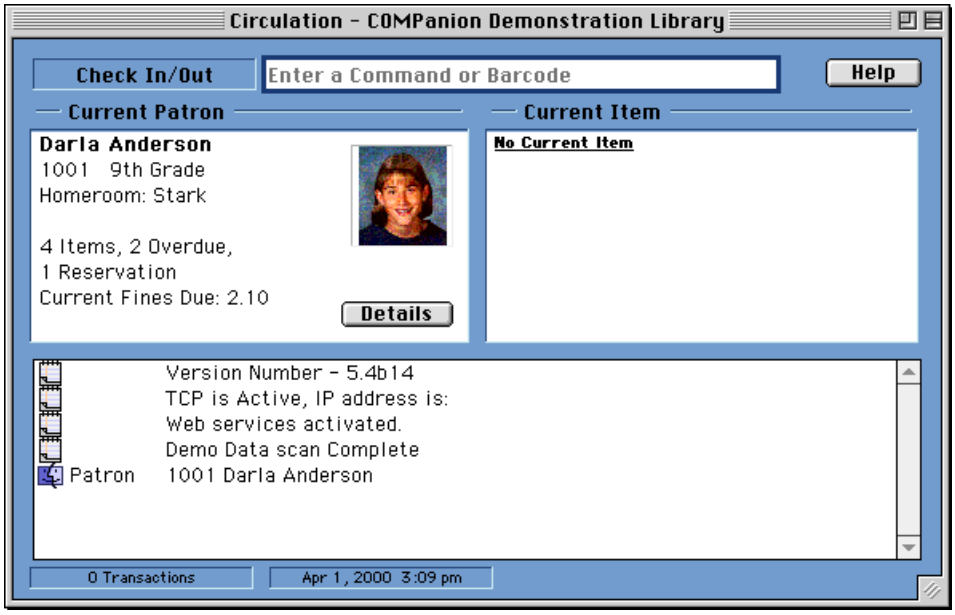
This chapter describes the **Circulation** window and how to use it to complete daily activities in your library.

The Circulation Window

The **Circulation** window is the main window at the Librarian Workstation. Use this window to enter library transactions such as check books in and out, place hold requests and reservations, process fees, fines, payments, and renew books. You can also complete special functions such as inventory, cataloging, record updating and viewing.

Use any of the following methods to display the **Circulation** window.

- Select **Circulation** from the **Show** menu.
- Press <command-t> on the keyboard.
- Select **Circulation** from the **Windows** menu.



Modes, Commands and Help

The top portion of the **Circulation** window shows the active mode, the command line, and the **Help** button.

- A mode is simply a function for which you may want to enter many patrons or items. For example, Bookdrop, Check In/Out, Hold, and Renew are all modes.
- The Command Line is where you enter a barcode for a patron or item, or you may enter a command. If you enter only a barcode, the displayed mode determines the action that is performed.
- Click the Help button to display a list of available commands and an explanation of how to use each one.

Current Patron and Current Item Information

The middle portion of the **Circulation** window displays general information about the Current Patron and Current Item.

> **- NOTE -**
>
> Many Alexandria functions depend on the Current Patron or Item. For example, you must have a Current Patron to check out, hold, or reserve an item.

- Click the **Details** button in the patron/item section to view more detailed information about the Current Patron/Item.
- Click the **Notes** button in the patron or item section to view notes entered for a particular patron or item. You enter the notes for a patron in the **Notes** tab in the Patrons window. You enter notes for an item in the **Copy Notes** tab in the Items window.

You can also select **Show Patron Details** or **Show Item Details** from the **Circulation** menu to view the same information as the **Details** button.

Transaction Log

The bottom portion of the **Circulation** window displays a transaction log. This log shows information for each transaction you complete and other operations you perform.

Select **Print** from the **File** menu to print the transaction log. The transaction log is automatically saved to disk by Alexandria according to the preferences you've selected *(see "Circulation Preferences" on page 75)*. Logs are saved inside the **Log** folder.

Using the Circulation Window

This section describes how to use commands, command help, and the **Circulation** menu to complete transactions in your library.

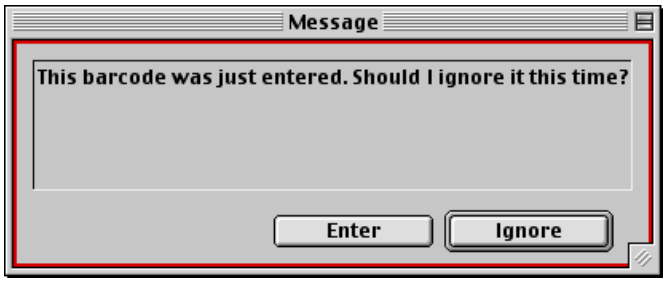
Using the Command Line

There are several ways to use the command line.

- **Enter a barcode.** You can enter a barcode manually by typing the number and then pressing <enter>, or scan a barcode using a barcode reader.

When you enter only a barcode, the action taken depends on the current mode, which is displayed to the left of the command line. For example, if the displayed mode is Check In/Out and you enter barcode "13456", item 13456 is checked out to the Current Patron.

If you enter the same barcode number twice in a row, a warning message appears.



- NOTE -

When you enter barcodes via portable readers, Alexandria ignores duplicate entries that appear side by side.

- **Enter a command and a barcode**. For an action other than those displayed in the mode field, enter a command followed by the barcode and press <enter> for additional actions. This will apply the action only to the barcode you enter. It does not change the mode. Thus entering a command of "B 13456" performs a bookdrop command only for item 13456.
- **Enter a command without a barcode**. If you enter a command without a barcode, the current mode changes. For example, if you enter H and press <enter>, the current mode is set to Hold. You can then enter a barcode for each item you want placed on hold for the Current Patron.

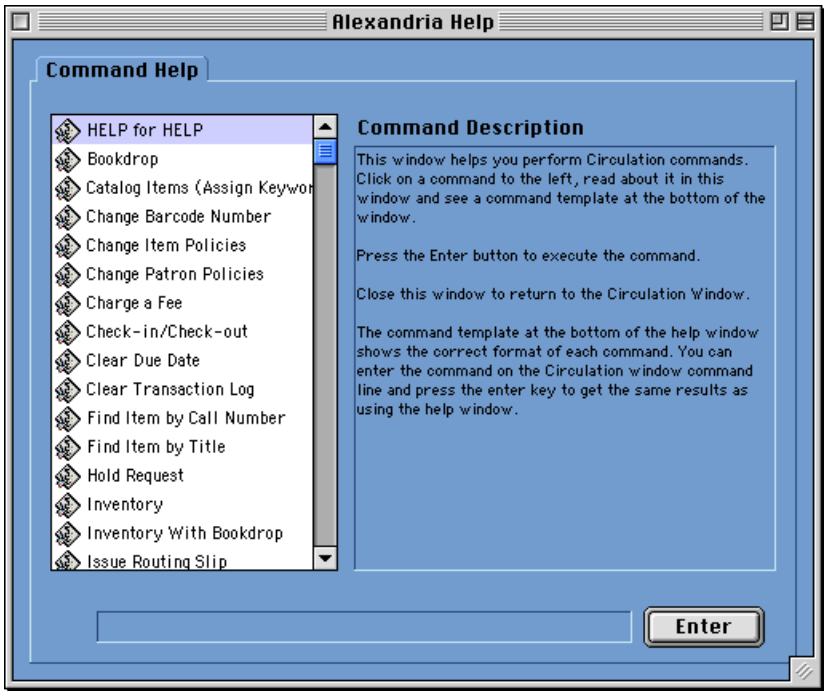
- SHORTCUT -

You can enter an equal sign "=" as a shortcut for the current item barcode. Thus "H=" places a hold on the current item.

Using Help for Commands

Click the **Help** button to the right of the command line on the **Circulation** window to display information about commands and how to use them.

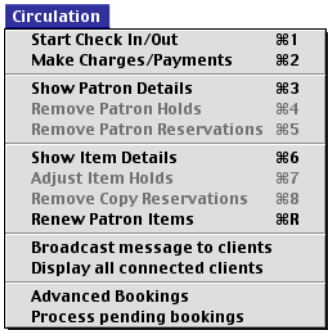
When you select a command from the list in this help window, it displays information about that command. It also displays the command letter and a blank field where you can enter the barcode or any additional information for that command.


Alexandria Help
Command Help
HELP for HELP
Bookdrop
Catalog Items (Assign Keywor
Change Barcode Number
Change Item Policies
Change Patron Policies
Charge a Fee
Check-in/Check-out
Clear Due Date
Clear Transaction Log
Find Item by Call Number
Find Item by Title
Hold Request
Inventory
Inventory With Bookdrop
Issue Routing Slip
Command Description
This window helps you perform Circulation commands. Click on a command to the left, read about it in this window and see a command template at the bottom of the window.
Press the Enter button to execute the command.
Close this window to return to the Circulation Window.
The command template at the bottom of the help window shows the correct format of each command. You can enter the command on the Circulation window command line and press the enter key to get the same results as using the help window.
Enter

Type or scan a barcode; this executes the command for the barcode that you entered. The **Circulation** window then appears.

If you select a command and click **Enter** without entering a barcode, the action taken depends on the command you selected. For example:

- If the command you select is a mode, Alexandria changes the current mode to the mode you select and displays the **Circulation** window under this mode.
- If the command you select is to locate something (for example, `T` to locate a title or `C` to locate a call number), a browse window appears. You can then make a selection from the browse window.
- If the command you choose performs a Circulation function, then the function is performed, the **Circulation** window appears, and the transaction log shows the results. For example, if you select the Hold Request command and enter a barcode, Alexandria puts a hold on the item and the **Circulation** window appears with an appropriate entry in the transaction log.



Using the Circulation Menu

Additional Circulation commands are available from the **Circulation** menu. This menu appears at the far right of the menu bar across the top of the **Circulation** window. You can either select a command from this menu or use the hot-keys shown in the menu to execute the command.

Some of the commands in this menu require a Current Patron or Current Item. For example, you must have a Current Patron to select **Show Patron Status**.

The menu shows the available commands in bold text. For example, if the Current Patron does not have any holds or reservations, the **Remove Patron Holds** and **Remove Patron Reservations** selections are not bold in the menu and therefore, non-selectable.

The following commands are available in the **Circulation** menu.

Start Bookdrop—Sets the current mode to Bookdrop. In Bookdrop mode, you can enter barcodes for items you want to check in.

Start Check In/Out—Sets the current mode to check in/check out. The menu toggles between **Start Bookdrop** and **Start Check In/Out** modes.

Make Charges-Payments—Add fines, remove fines, accept payments for fines incurred and issue refunds for payments made. You must have a Current Patron displayed to select this item.

Show Patron Details—Shows the complete details of the Current Patron; includes all transactions, fines, requests, and so forth. You must have a Current Patron displayed to select this item. Performs the exact same function as the **Details** button.

Remove Patron Holds—Shows the items the Current Patron has on hold. To remove a Hold request, click on the request you want to remove and click on **Remove Hold**. You must have a Current Patron with hold requests displayed to select this item. To remove an in-stock hold, let it expire, or bookdrop it. The next patron in the hold queue will be assigned the item.

Remove Patron Reservations—Shows the items with reservations pending for the Current Patron. To remove a reservation request, click on the reservation and click on **Remove Reservations**. You must have a Current Patron with reservations displayed to select this item.

Show Item Details—Shows the complete details of the current item, including the status of all copies of that title. You must have a current item displayed to select this item. Performs the exact same function as the **Details** button.

Adjust Item Holds—Shows all patrons who have hold requests for the current title. You can remove a request from the queue (or move it up or down in order). You must have a current item with hold requests displayed to select this item.

Remove Item Reservations—Shows all forward reservations for the current item. To remove reservation requests, click on the reservation and click on **Remove Reservation**. You must have a current item with reservations displayed to select this item.

Renew Patron Items—Shows all items currently checked out to the Current Patron. Either click on the Renew All button to renew all of the items or highlight the items to renew and click on the Renew button. The Current Patron must have items checked out.

Broadcast Message to Clients—Displays a text box for entering and sending messages to other Librarian and Researcher applications connected to the Data Station. This message will only display to currently connected clients.

Display All Connected Clients—Lists in the transaction log all the Librarian and Researcher applications that are currently connected to the Data Station. The type of application and the machines' IP address are visible in the log.

Alexandria Circulation Commands

The following are the commands that control the **Circulation** window:

Command	Result
*	Read Transaction File
.	Clear Override Date and Mode
..	Resets and clears transaction window
. {date}	Set Override Date
+	Show patron notes
+ {comment}	Append a Patron Note
# {comment}	Put Comment in Log
+#	Clear a Patron Note
+# {text}	Replace a Patron Note
++	Show item copy notes
++#	Clear a copy general note
++ {text}	Append a copy general note
++# {text}	Replace a copy general note
+++	Print transaction log
/ {old barcode=new barcode}	Change barcode number
AS or ASB	Set Self Service
B {optional barcode}	Bookdrop command
C {call number}	Find an item by Call Number
D	Print Transactions for Current Patron
E {subscription code}	Receive Subscription
F	View Charges and Payments command
F {charge amount} {description}	Charge a Fee
G {item barcode}	Reservation command
GG {item barcode}	Reservation check out by Item
GP {patron barcode}	Reservation by Patron
GPP {patron barcode}	Reservations check out by Patron
H {item barcode}	Hold command
I {B} {inventory date}	Take Inventory
J {item barcode}	Reserve command
K	Recall copy

KM	Recall copy with Email notification
L {patron name}	Locate a patron by name
M {route name} {=Item barcode}	Issue Routing Slip
NC	Charge Copy location
NP	Change Patron Location
O	Overnight check out
P {patron barcode}	Make patron current
Q {barcode}	Display status of patron or item
QF	Renew Patron Items from List
R {item barcode}	Renew command
RA {patron barcode}	Renew all for Current Patron
T {title}	Find an Item by Title
UI {new policy code}	Change Item Policy
UP {new policy code}	Change Patron Policy
V {type} {word}	Classification command
X	Clear Current Patron and Item
X {barcode}	Make patron or item current
Y	Statistics command
Z	Clear transaction log

Alexandria Circulation Commands

Command: z
Clear the Transaction Log—This command removes all entries in the visible transaction log. The log entries saved to disk are not affected by this command.

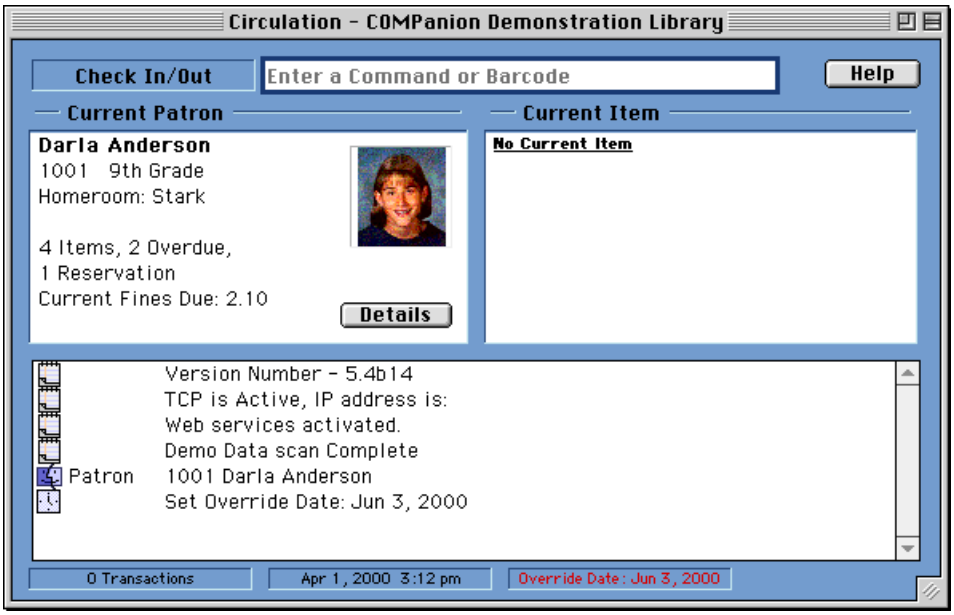
Command: ..
Reset Mode—Use this command to clear any special mode in effect and prepare the window for check out. This is the same as the period command, except it clears the Current Patron/Item and doesn't clear the override date setting.

Command: +++
Print the Transaction Log—The transaction log is a list of each transaction you have completed. This log appears at the bottom of the Circulation window. Use the "+++" command to print the transaction log. You can also select Print from the File menu to print the transaction log.

Command: x
Clear Current Patron/Item Mode—Use this command to clear the Current Patron, Current Item and override date.

Command: `.{date}`
Set an Override Date—Typically, due dates are computed based on the policies you specify under **Preferences**. You can use this command to set different due dates for items you are checking-out, book-dropping, reserving, showing used, or performing inventory on. For example, to set the due date to June 3, 2005, type "`.Jun 3 05`" (including the period) and press <enter>. Until you clear or reset this command using either "`.`" or "`x`", the following changes will be performed.

- Books you check out will be due on June 3, 2005.
- When you bookdrop, the system will record the book as having been checked in on June 3, 2005.
- When you perform Inventory, the inventory date used will be June 3, 2005.
- When you are in Statistics mode, this date is used.
- The Override Date you set is shown on the **Circulation** window, at the bottom-right corner of the transaction log. A transaction log entry also shows that this date was manually set.



The date you set is in effect until you clear it. To clear the Override Date, type a period without a date. The "`.`" command also clears special modes (such as Bookdrop or Inventory) that are in effect. The period command without a date is a quick way to prepare the window for check out.

Command: `.`
Clear Override Date Mode—Use this command to clear the override date and reset the mode to Check In/Out.

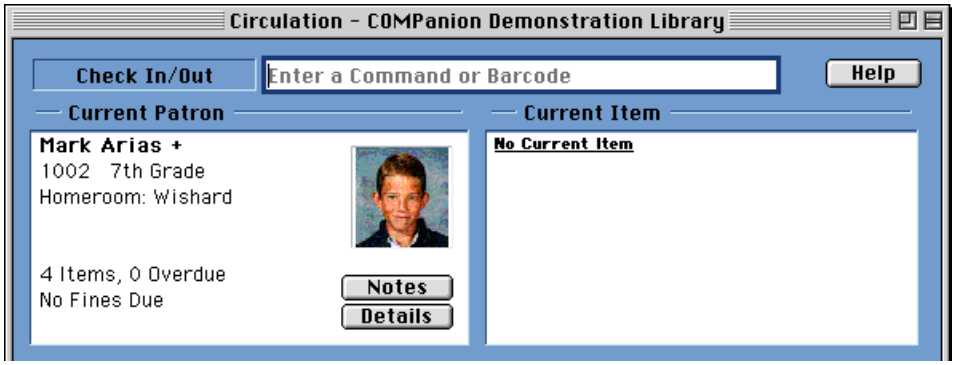
Command: +
Show Patron Notes—You can enter general notes for a patron on the **Notes** tab in the Patrons window. When general notes have been entered, a **Notes** button will appear in the Current Patron field on the **Circulation** window. To view the patron notes, click on the **Notes** button or enter a "+" on the command line.

Command: + **{text}**
Append a Patron Name—You can add more to the Current Patrons general notes from the Circulation command line rather than having to go into the Patron Management window to change the note.

Command: +# {text}
Replace Patron Notes—You can use this command to completely replace the Current Patron general note with the text you enter. Entering the "+#" command without any text will clear the Current Patron's general note.

Command: ++
Show Item Copy Notes—You can enter notes for an item copy on the **Copy Notes** tab. This tab appears on the **Item Copy Data** window when you select **Add Copy** on the **Items** window.

When notes have been entered for a copy, a **Notes** button appears in the Current Item section on the **Circulation** window.



Enter two plus signs "++" on the command line, or click on the **Notes** button to view the general notes for the current item.

Command: # {comment}
Put Comment in the Log—Use this command to put a note in the transaction log. Notes can be **very** useful for making a permanent record of special events that happen in the library. For example, enter "# Lights flickered, battery backup saved our machine!" when the power goes down. You then have a permanent record of when this event occurred. Or "# Fire Drill started" when you return to the library, it's clear if there has been any activity while you were gone!

Command: ++ **{text}**
Append a Copy Name—You can add more to the Current Item general notes from the Circulation command line rather than having to go into the Item Management window to change the note.

Command: ++# {text}
Replace Copy Notes—You can use this command to completely replace the Current Item general note with the text you enter. Entering the "+#" command without any text will clear the Current Item's general note.

Command: `X {barcode}`
Make a Patron or Item Current—Use this command to make the item or patron barcode the Current Item or Current Patron. For example, `"X100"` makes patron 100 the Current Patron and "`X110034"` makes item 110034 the Current Item. If you enter an `"X"` without a barcode, the current item and patron setting are cleared and the window is ready for check out.

Command: `P {patron barcode}`
Make a Patron Current—Use this command to make a particular patron the Current Patron. For example, to make patron 100 the Current Patron, enter "`P100"`. This command is useful if you have an overlap in patron and item barcode numbers. Alexandria checks the item codes before the patron codes, so if you enter the patron code on the command line or use the `"X"` command, Alexandria finds the item rather than the patron.

Locating Patrons and Items

Use the commands in this section to locate patrons and items for which you don't know the barcode number. For example, if you want to check out a book to a patron, but you don't have that patron's barcode, you can use a locate command to find the patron by name.

When you enter a locate command, a list of patrons or items appears in a Browse window. The list begins with the first patron or item that is the closest match to the value you entered. When you select a patron or item from the list, they become the Current Patron or Item and appear on the **Circulation** window.

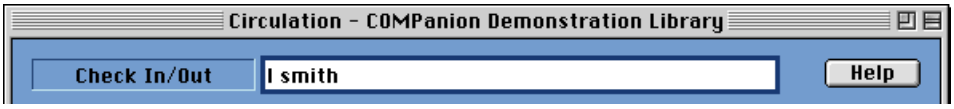
Use the up and down arrows on the keyboard to move through the list.

Double-click a name in the list or select it and press the <enter> key. When you select a name from this window, it becomes the Current Patron and appears on the **Circulation** window.

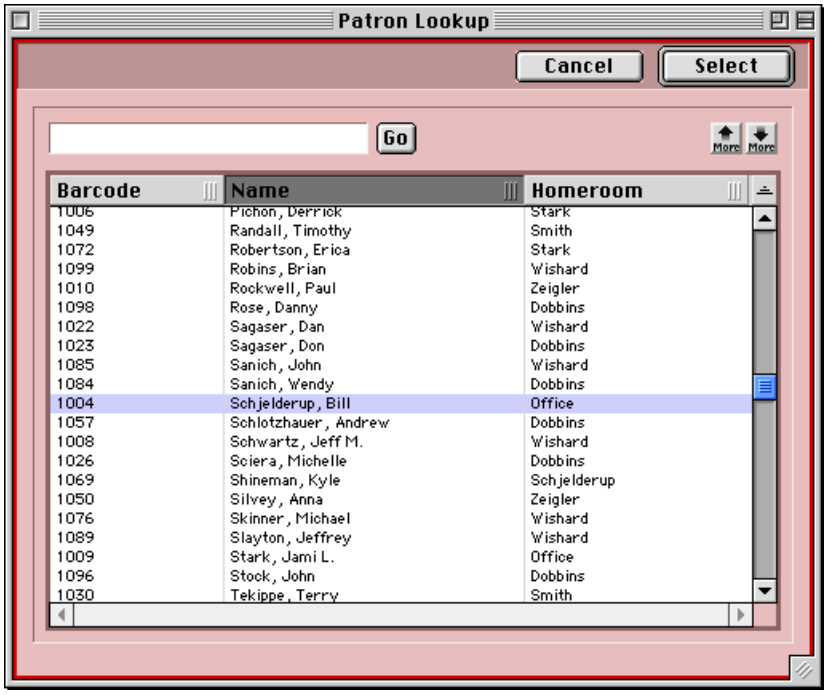
You can enter a new name in the **Browse From** field at the top of the window and press <enter> to display a new list starting with the name you enter.

If the list has more patrons than can be viewed on one window, use the More buttons to examine additional patrons. To view more patrons, select the last name in the list and click the down arrow at the top of the window *(see "Browsing Records" on page 47).*

Command: `L {patron name}`
Locate a Patron by Name—Use this command to find a patron by name and to make it the Current Patron. For example, to find a patron with the last name Smith, enter `L SMITH`.



The browse window appears starting near the patron whose name matches the name you entered.



Command: `C {call number}`
Find an Item by Call Number—Use this command to locate a copy, searching by the copy's call number. For example, to locate a title with call number 150, type "`C 150`" and press `<enter>`. The browse window appears, starting with the first item in the collection that matches the call number you entered.

Command: `T {title}`
Find Item by Title—Use this command to search for the first copy of an item by title or a portion of the title. For example, to locate an item with a title beginning with *Foundation*, type "`T foundation`" and press `<enter>`.The browse window appears starting with the first item in the collection close to the title you entered.

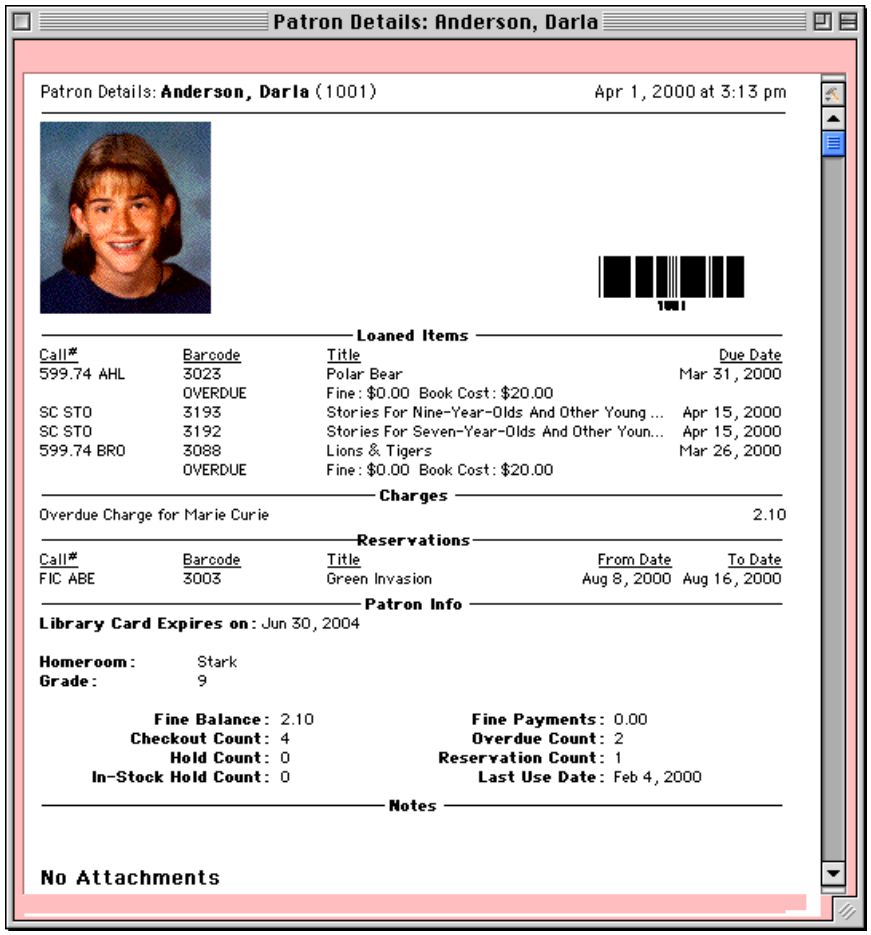
Checking Patron and Item Status

Command: `Q {barcode}`

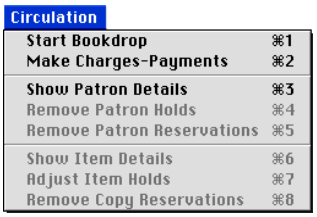
Checking Patron and Item Status—Patron status includes information such as loaned items, due dates, reserved items, reservations, and library card expiration dates. The item status includes the Circulation status, holds queue, and reservations queue for all copies of the specified title. This makes it very easy to find the status of a particular copy or the total status of the title.

Use the Q command to display the status of a patron or item.

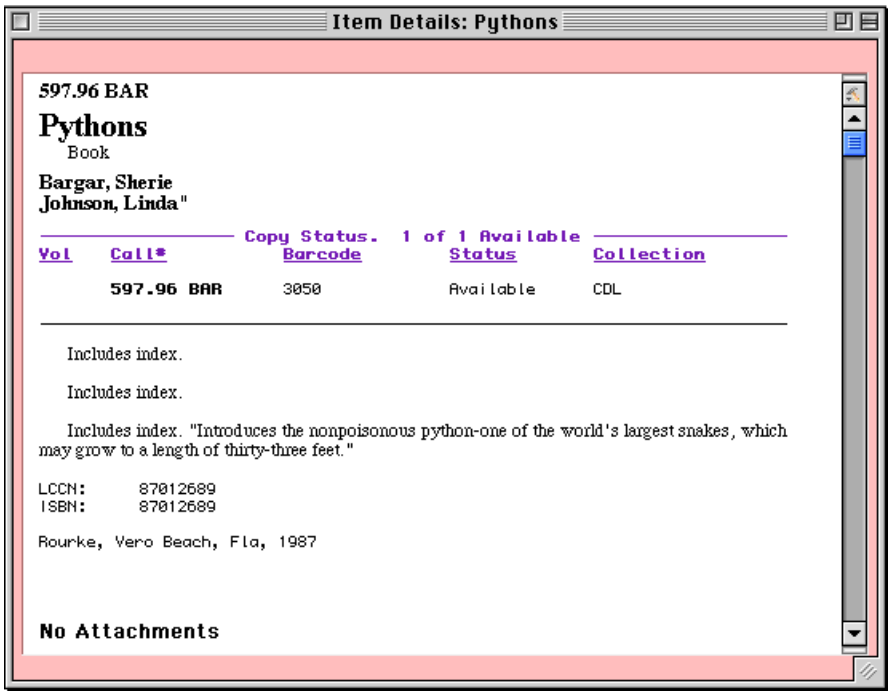
- To display the status for a patron, type `Q` then enter or scan the barcode number for the patron and press <`enter`>. If you do not enter a barcode, the status of the Current Patron is displayed.


Patron Details: Anderson, Darla
Patron Details: Anderson, Darla (1001)
Apr 1, 2000 at 3:13 pm
Loaned Items
Call# Barcode Title Due Date
599.74 AHL 3023 Polar Bear Mar 31, 2000
OVERDUE Fine: $0.00 Book Cost: $20.00
SC STO 3193 Stories For Nine-Year-Olds And Other Young ... Apr 15, 2000
SC STO 3192 Stories For Seven-Year-Olds And Other Youn... Apr 15, 2000
599.74 BRO 3088 Lions & Tigers Mar 26, 2000
OVERDUE Fine: $0.00 Book Cost: $20.00
Charges
Overdue Charge for Marie Curie 2.10
Reservations
Call# Barcode Title From Date To Date
FIC ABE 3003 Green Invasion Aug 8, 2000 Aug 16, 2000
Patron Info
Library Card Expires on: Jun 30, 2004
Homeroom: Stark
Grade: 9
Fine Balance: 2.10
Checkout Count: 4
Hold Count: 0
In-Stock Hold Count: 0
Fine Payments: 0.00
Overdue Count: 2
Reservation Count: 1
Last Use Date: Feb 4, 2000
Notes
No Attachments

If you don't know the patron's barcode, use the locate command (`L {patron name}`) to find the patron and the patron's barcode.



- To view an item's details, type `"Q"` then enter or scan the barcode number for the item and press `<enter>`.



If you do not know the item barcode, use one of the find commands (`C call number` or `T title`) to find the item and its barcode.

There are two other ways to view the status of the Current Patron or Item.

- Use the **Show Patron Details** and **Show Item Details** commands on the **Circulation** menu.
- Click the **Details** button in the Current Patron or Current Item section of the **Circulation** window.

Checking Items Out and In

Alexandria makes it easy to check items out and in. Alexandria automatically determines whether a barcode belongs to a patron or item and whether an item is checked out or in. Because of this, Alexandria can usually determine the appropriate action to take.

In addition, while you are performing transactions, Alexandria automatically computes due dates, adjusts for closed dates, verifies policies, and collects statistics.

The subsequent sections detail checking-out and checking-in. Other sections in this chapter describe special kinds of checkouts, such as temporary items, renewing, reserving, and making reservations. It also covers tracking "special status" items such as lost, archived, and on order.

> **- NOTE -**
>
> You can use the equal sign instead of the barcode for the current item in any command. For example, if the current item is 3000, then `H=` is the same command as `H3000`.

Checking Items Out

Use the following steps to check an item out.

Step 1. Enter or scan the barcode of the patron who is checking-out an item. This makes the patron the Current Patron.

If you do not know the patron's barcode, use the locate command (`L {patron name}`) to find the patron and their barcode.

Step 2. Alexandria sets the due date for items using the **Circulation Policies** established for your collection. To enter a different due date, use the Set Override Date command (`.date`) detailed on page 162.

As you check out items, the item details appear on the **Circulation** window. A line is also added to the transaction log to show that this item has been checked out.

Step 3. Enter or scan the barcode for the item you want to check out to the Current Patron.

Special Conditions When Checking Out Items

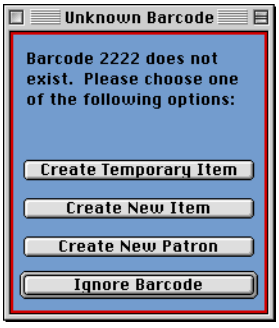
When you are checking items out, Alexandria will alert you to special conditions that may affect check out.

- If you enter a barcode for a book that is already checked out, a message appears.

You can choose to check this book in, or cancel the request to check it out.

- If checking-out an item to the patron violates a set policy, Alexandria shows you a warning message. For example, if a patron exceeds the limit for the number of items they can check out, or exceeds the overdue limit, a warning message appears. If more than one policy setting is violated, the messages will appear in a single window.

Message
Patron: Marijane Lou Coots (1036)
Item: Music of the 60's (5978)
Maximum number of items (3) are already checked out to this patron.
Override and check this item out anyway?
Cancel
Override


Unknown Barcode
Barcode 2222 does not exist. Please choose one of the following options:
Create Temporary Item
Create New Item
Create New Patron
Ignore Barcode

If you have authority to override policies, the window includes the "**Do you wish to allow this check out anyway?**" option. You can choose to let the patron check out the item (even though it exceeds the specified limit) or cancel the request to check it out. If you do not have authority to override policies, only a warning message is displayed and you will not be allowed to check out the item to the patron.

If the item barcode you enter is not assigned to an already existing item and is not in the temporary barcode range defined in your preferences, the following window appears.

You can choose to **Ignore Barcode** if you entered it incorrectly, or you can select one of the other options.

If a copy is designated as an in-stock hold for another patron, an error message will appear. If you have authority, a **Cancel** / **Override** button will appear at the bottom of the screen. Clicking **Override** will check the copy out to the Current Patron with the in-stock hold back at the top of the hold queue. If you do not have authority, no override options will be available and item check out will be denied.

Using Special Patrons

There are several special patrons that are created automatically by Alexandria. You can use these patrons to track items with a special status such as lost, archived, or out-for-repair. For example, to track items that have been lost, you can check them out to the **Lost Patron**, which has barcode #1.

Special patrons use the System Policy, which has no restrictions on number of items checked out.

The following are the special patrons in Alexandria:

Lost Items (Barcode 1)—To keep track of items in your collection that have been lost, check them out to this patron. Unlike other items, an item checked out to the Lost Item Patron does not have its inventory date updated. If the item is found, simply check it in and it's available for check out by real patrons.

If the item is already checked out to real patron, when you check it out to the Lost Item Patron, a window appears so you can charge a fine to the patron who has the item checked out. The lost item appears on the patron's status report.

Although you can remove an item from the Alexandria system when it's lost, items are often found later. Checking a lost item out to Lost Item Patron makes it easier to put it back in to the system because you simply check the item back in when it's found.

Using Lost Item Patron also makes it easy to keep track of which items have been lost so you can order new copies.

There are utilities available to remove lost items according to your policies and the criteria you select.

Discarded Items (Barcode 2)—To track of items in the library which are not to be used, but have not yet been removed, check them out to this patron. To change a Discarded item back into an "in-stock" item, simply check it in.

To permanently remove discarded items from your collection, use the **Item Utility** for this purpose.

For Library Use (Barcode 3)—To keep items available for use *only* within the library, check the items out to this patron. For example, you might want to keep holiday books available in the library and not allow them to be checked out during the holiday season. Check these items out or place a reservation on these items using the For Library Use Patron.

On Repair (Barcode 4)—To keep track of an item sent for repair and not available to patrons, check the item out to this patron. When the item is returned from being repaired, check it in to make it available again.

On Order (Barcode 5)—To keep track of items on order, add the item to your collection when you order it and check it out to this patron. Enter an override date that matches the scheduled delivery date for the item. When you receive the item, check it in to make it available to real patrons.

Archived Items (Barcode 6)—To mark certain items as archived and not available to patrons, check the items out to this special patron. For example, check out items to this patron if they are items kept in a special room and not generally available for Circulation.

You can create and remove your own special patrons to track items with a unique status as needed for your library. Use barcodes 50 or under for special patrons. These patrons are assigned the System policy, which does not restrict the number of items they can check out.

The following are examples of uses for special patrons you create:

- Instead of using the **Library Patron** to reserve holiday books, create a Holiday Patron and check out holiday books to this patron.
- Instead of using the **On Repair Patron**, create a special patron for each Vendor who repairs your items. When you send an item to that Vendor for repair, check it out to that Vendor for the period of time the Vendor will have the item.
- Instead of using the **On Order Patron**, create a special patron for each Vendor from whom you order items. When you order an item from the Vendor, check it out to that Vendor and enter an override date that matches the scheduled delivery date.

Checking Items In

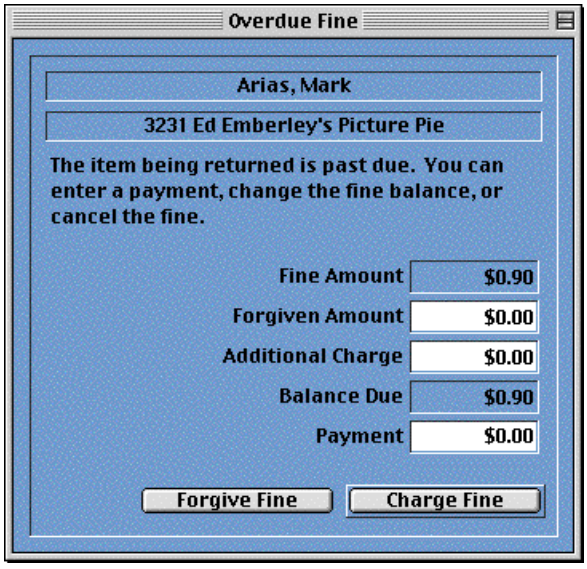
Use the following steps to check in items for a patron.

Step 1. Enter or scan the barcode of the patron who has the item checked out. This makes that patron the Current Patron.
If you do not know the patron's barcode, use the locate command (`L patron name`) to find the patron's barcode.

Step 2. Enter or scan the barcode of the item you are checking-in.

If you are checking-in a number of items, use the Book-drop mode described on the next page.

If the item you check in is overdue and has a fine, a window appears with information about the fine.



On this window, you can enter a payment, forgive the fine, forgive a portion of the fine, or record the fine to the patron's record to be processed later. If you want to forgive part of the fine, enter a value in the **Forgiven Amount** field. If you want to charge an additional amount, enter the value in the **Additional Charge** field. To record a payment, enter it into the **Payment** field. To forgive the entire fine, click on the **Forgive Fine** button. To charge the fine, click on the **Charge Fine** button *(see "Handling Charges and Payments" on page 185)*.

Using Bookdrop Mode

Command: `B {optional barcode}`
Using Book-drop Mode—Use the Bookdrop command to check in items for one or many patrons. In Bookdrop mode, all the item barcodes you scan (or enter) are checked in. This provides a quick way to check in a large number of books without worrying about the patrons. For example, this mode provides a quick way to check in the books left in the bookdrop slot overnight.

- To check in one item, type `"B"` followed by the item's barcode number and then press `<enter>`.
- To check in many items, type `B` and then press `<enter>`. This switches the program in Bookdrop mode (you can also start Bookdrop mode by selecting **Start Bookdrop** from the **Circulation** menu.)

While in Bookdrop mode, Alexandria assumes you are only checking items in. If you enter or scan a barcode for an item that is not checked out, a message appears in the transaction log. If you enter a patron barcode, Alexandria switches to Check In/Out mode and makes this patron current.

Temporary Items

You can use Alexandria's temporary item check out function to keep track of items in your library that are borrowed, but you don't want entered as part of your inventory. For example, you may want to keep track of when newspapers, brochures, magazines, and other items are borrowed and returned, but not inventory them because of their limited shelf life.

A temporary item is recorded at check out and checked in the same as any other item. Temporary items may be renewed and have fines charged against them. However, once the item is checked in, the transaction record and temporary item information is removed from Alexandria.

While they are checked out, temporary items show on loaned item reports, overdue lists, fine lists, and lost item lists. Because they are not inventoried, they do not show on inventory reports or shelf list reports. A temporary item cannot be searched using the catalog. If these items circulate frequently, it may be better to catalog them in Item Management; otherwise they will need to be re-entered each time they circulate.

Setting Up Temporary Check Out Items

(see "Circulation Preferences" on page 73) for information on setting up temporary barcode defaults.

Checking Out Using Temporary Items

There are a number of ways to use the temporary item check out function.

You can prepare several temporary check out cards with temporary barcode numbers established in your preferences. When a temporary item is going to be checked out, attach one of these cards. When the item is returned, remove the card and return it to the stack of temporary check out cards to reuse again for other temporary items.

Another way to use temporary check out is to place a temporary barcode within the range specified in your preferences on all temporary items that might be checked out. The barcode is then used only for that item, but never permanently entered into Alexandria. For example, as newspapers are received, you put a temporary barcode number on the newspaper.

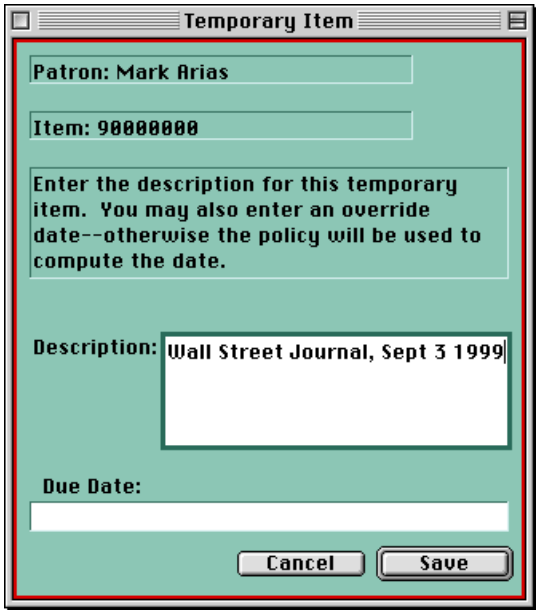
- NOTE -

You can print temporary barcode labels from Alexandria. Choose Special Reports from the Reports menu, then select Custom Barcode Labels.

When you enter a barcode number in the command line, Alexandria checks the following:

- Alexandria first checks if the number is used by an existing item.
- If it is not used by an existing item, Alexandria checks to see if the number is being used by an existing patron.

- If it is not used by an existing patron, Alexandria checks to see if the number is within the range determined for temporary items in Circulation preferences *(on page 73)*. If the number is within this range, Alexandria displays the following window.


Temporary Item
Patron: Mark Arias
Item: 90000000
Enter the description for this temporary item. You may also enter an override date--otherwise the policy will be used to compute the date.
Description:
Wall Street Journal, Sept 3 1999
Due Date:
Cancel
Save

Follow these steps to check out the temporary item.

Step 1. Enter a description of the item in the **Description** box.

Step 2. If you want to specify a due date, enter it in the **Due Date** field. If you do not enter a due date, Alexandria computes a due date based on the policies you assigned for temporary items.

Step 3. Click **OK**.

Renewing an Item

Command: `R {item barcode}`
Renewing an Item—Use this command to renew an item or begin Renew mode. You can specify the number of times an item can be renewed in your Circulation policies *(documented on page 97)*.

- To renew an item, type `"R"` and scan (or type) the barcode number for the item and press <enter>. If your Circulation policies allow, this item is renewed to the patron who has it checked out. That patron also becomes the Current Patron.

If you do not know the item barcode, use one of the find commands (`C call number` or `T title`) to find the item's barcode.

- To start Renew mode, type `"R"` and press <enter>. All item barcodes you type or scan while in this mode are renewed. To exit Renew mode, enter a patron barcode number or use the `"X"` or <period> command.

If the renewal is not allowed, a message appears to inform you. A renewal is not allowed when the Circulation policy is set to not allow renewals or when renewing an item would take the item into a reserved date range.

Command: `RA`
Renewing an Item—When you have a current patron, this command renews all items for that patron.

Command: `QE`
Renewing an Item—Brings up a list of all the books checked out to the Current Patron, allowing you to choose which books to renew *(this is also a menu option)*.

Reserving an Item

A reserve is a special type of check out. Use the reserve function when you want to keep items available for use in the library. Also use the reserve function when you want items only available for certain patrons such as teachers or department managers. For example, a teacher may want to place a number of items on reserve for students in a class. Another example would be that a librarian wants to create a special group of items temporarily available for use in the library, but not available for check out.

An item that has been checked out using the Reserve command has a due date in the far future, is never charged fines, and does not count as a checked out item. However, the system does record summary information on reserves, which is displayed in the Patron statistics window and in all Patron Transaction reports.

If you want to reserve items for a short period of time, use the Reservations function.

Command: `J {item barcode}`
Reserve an Item—Reserve an item for the Current Patron or to start Reserve mode.

- To reserve an item for the Current Patron, type `J` then enter or scan the barcode number for the item the Current Patron wants to reserve and press the `<enter>` key.

If you do not know the item barcode, use one of the find commands (`C call number` or `T title`) to find the item and its barcode.

- To start Reserve mode, type `"J"` and press `<enter>`. All item barcodes you enter or scan while in this mode are reserved for the Current Patron. To exit Reserve mode, enter a patron barcode number or use the "`X`" or "`.`" command.

Reserved items can only be checked in when the patron who checked them out is the Current Patron and Alexandria is in Check In/Out mode. This makes it more difficult for a reserved book to be checked in by another patron or be accidentally checked in with the Bookdrop command.

Hold Requests

When an item is not available, a patron can place a hold request for that item. When the item is returned to the library, a message appears at the Librarian Workstation asking to hold that item for the requesting patron. An item waiting to be claimed is shown in the hold list as an In-Stock item[1].

> **- NOTE -**
>
> A hold request is different than a reservation. A hold request puts your name on a list to check out an item when it becomes available. A reservation checks out a specific copy in advance for a particular time.

If more than one patron requests a hold for the same item, Alexandria keeps a list of the patrons in the order they requested the item.

Your circulation policies determine how long a hold request can stay active. The expiration date for the hold is shown in the transaction log when you place the hold.

1. An In-Stock "hold" is actually a special type of check out for the requesting patron. To remove the In-Stock hold, either check out the item to the requesting patron, or Bookdrop the item. When performing a Bookdrop, if other hold requests are pending, an In-Stock hold is created for the next patron in the hold list.

Alexandria updates hold queues each day. If a held item is not claimed within the circulation policy limit, it is assigned to the next patron in the request queue. If no other patrons are waiting for the item, it is released for general circulation. This activity is recorded in the transaction log.

You can print a list of In-Stock items using **Circulation Reports** in the **Reports** menu.

Placing a Hold Request

Command: `H {item barcode}`

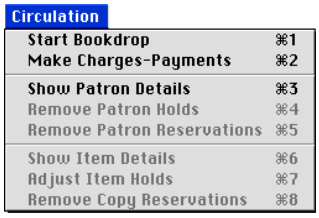
Placing a Hold Request—Use the `"H"` command to place a hold on an item for the Current Patron or to begin Hold mode.

- To hold an item for the Current Patron, type `"H" and` then scan (or type) the barcode number for the item which the Current Patron wants to hold and press `<enter>`.

If you do not know the item barcode, use one of the find commands (`C call number` or `T title`) to find the item's barcode.

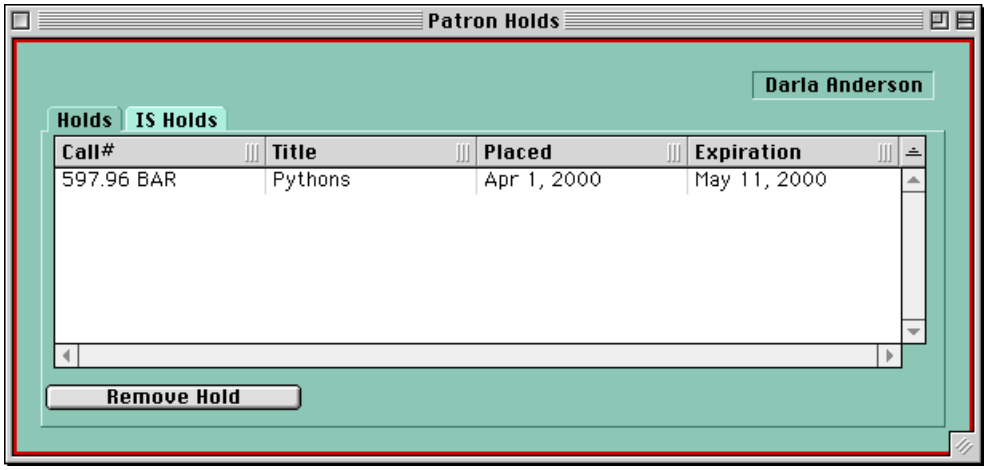
- To start Hold mode, type `H` and press `<enter>`. A hold request is placed on each item whose barcode you type or scan while in this mode. To exit Hold mode, type a patron barcode number or use the `"X"` or `"."` command. A current Patron is necessary.

> **- SHORTCUT -**
>
> You can enter an equal sign `"="` as a shortcut for the current item barcode. Thus, `"H="` places a hold on the current item.



Removing Patron Holds

Use **Remove Patron Holds** from the **Circulation** menu to remove hold requests for the Current Patron.



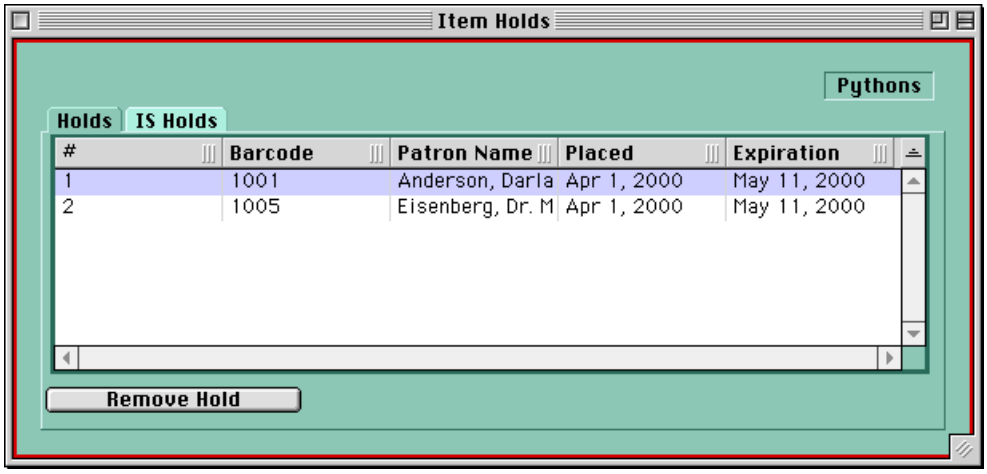
To remove a hold request, select the line you want to remove and click the **Remove Hold** button.

W A R N I N G !

When you remove a hold request on this window, you cannot undo the remove. The only way to restore the hold is to place a new hold for the patron whose request was incorrectly removed.

Adjusting or Removing Item Holds

Use **Adjust Item Holds** from the **Circulation** menu to adjust or remove hold requests for the current item. The **Holds** tab shows items that are checked out, but have a hold placed on them by another patron.



To remove a hold, select the item and click the **Remove Hold** button.

To change the order of the hold requests, click on a hold request and drag the line up or down. To save the results, click the **Save** button. To ignore any changes, click on the **Cancel** button.

Reservations

Use the reservations feature when a patron wants to check out an item from the library for specific dates. When this item has a reservation, it's only available for check out by the requesting patron during the specified dates. If another patron tries to check out this item during the reservation period, Alexandria rejects the request or adjusts the check out period to accommodate the reservation.

> **- NOTE -**
>
> A reservation is different than a hold request. A reservation checks out a specific copy in advance for a particular time. A hold request puts your name on a list to check out an item when it becomes available. A reserve is just for use in the library.

Reservations are displayed on patron status and item status reports. Unlike hold requests, reservations are placed on *specific* copies in the collection. If you have multiple copies of an item, you place the reservation on *one* copy. Alexandria automatically removes expired reservations.

A patron can have an unlimited number of reservations. Your circulation policies specify the maximum number of days for a copy reservation. To prohibit reservations, set the maximum number of days to zero.

You can select more than one set of dates for a reservation.

You can also use reservations and the special For Library Use Patron (Barcode 3) to ensure that an item is available for use in the library during a specific time period. For example, you can make a reservation for the For Library Use Patron on all Thanksgiving books for November 15th through the 30th. No other patrons can check out these books while those reservations are active.

Placing a Reservation

Command: `G {item barcode}`

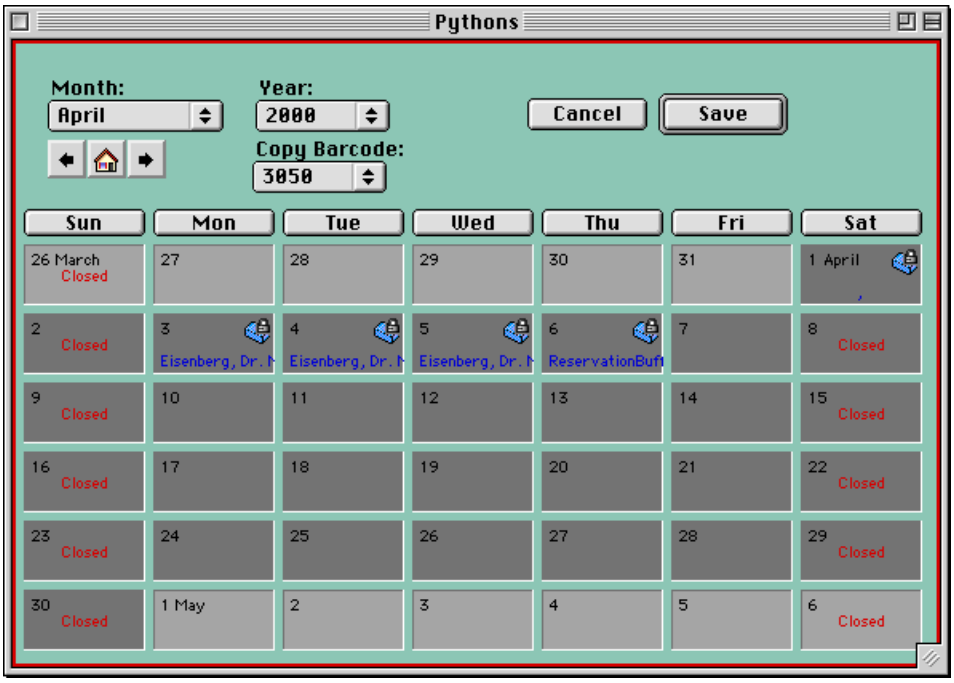
Place a Reservation—Place a reservation on an item for the Current Patron or to begin Reservation mode.

- To place a reservation on an item for the Current Patron, type `"G" and` then scan (or type) the barcode for the item which the Current Patron wants to make a reservation for and press <`enter`>.

If you do not know the item barcode, use one of the find commands (`C call number` or `T title`) to find the item's barcode.

- To start Reservation mode, type `"G"` and press <`enter`>. A reservation for the Current Patron is placed on each item whose barcode you type or scan while in this mode. To exit Reservation mode, enter a patron barcode number or use the `"X"` or `"."` command.

When you enter the G command, Alexandria displays a calendar for you to mark the days in which you want to place a reservation for the Current Patron. The calendar will show the current month.



You cannot make reservations on days marked with the lock icon. This calendar will mark days as follows:

- Days that the library is closed show the word CLOSED. In the above example, the library is closed Saturdays and Sundays.
- Days that the item is already reserved for another patron are marked with a lock icon. The barcode number or name of the patron who has the reservation is shown. Select different days for the Current Patron, or select a copy of the title (if available) from the pull-down menu in the upper left of the calendar.

To make a reservation for the Current Patron, click on those days you want to reserve the item. You can drag across days to choose more than one for a reservation. Days you select will be marked with the patron's barcode or name. To omit a day you have already selected, click on it again.

NOTE:

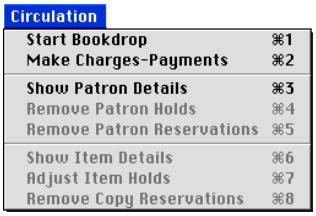
Make sure the reservation dates are correct before you save. They CANNOT be changed later. To change dates, you must remove the incorrect reservation and place a brand new reservation.

You can select any available days, as long as it does not exceed the number of days specified in the circulation policy for both patron and item. If your Circulation Preferences allow, you can select closed days to start and end the reservation.

When you have selected the days for the reservation, click the **Save** button. You can make more than one reservation on the calendar for single or multiple copies.

Use the **Cancel** button if you want to leave the window without placing a reservation.

To print reports for copies with reservations, select **Circulation Reports** from the **Reports** menu and choose the **Reservations** report. Using the selection options, you can specify which reservations to print.



Reservation by Patron

Command: `GP {patron barcode}`
Reservation by Patron—Use the `GP` command to place reservations on a Current Item for several different patrons. The current item isn't cleared and each command entered brings up the Reservations window for the Current Item. This command is useful for when you have a popular item that many patrons want to place a reservation on.

Reservations Check Out, by Item

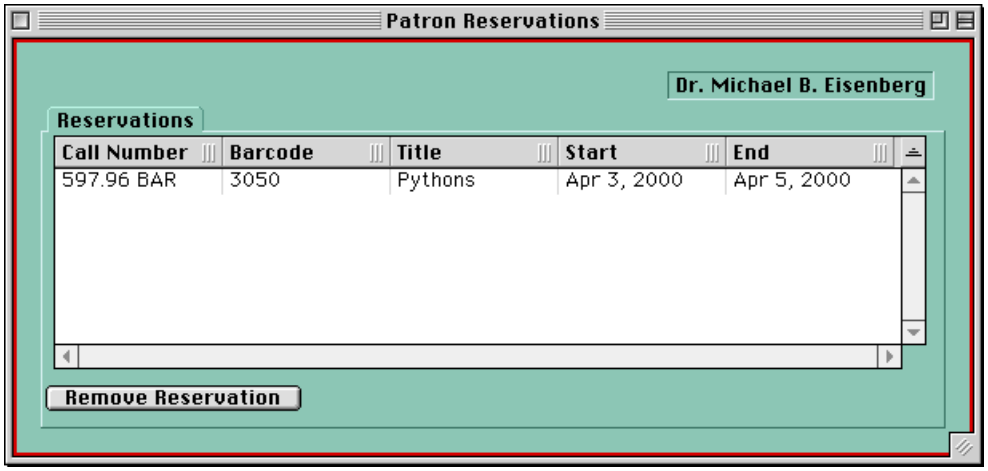
Command: `GG {item barcode}`
Reservations Check Out by Item—Use the `GG` command to check out items which have reservations that begin "close" to the current date. In this mode, all you need to do is scan the barcodes of the copies with reservations. If there is a pending reservation, Alexandria will check out the item to the correct patron. The "close to" preference is days to look ahead when checking in reservations in Circulation Preferences.

Reservations check out, by Patron

Command: `GPP {patron barcode}`
Reservations Check Out by Patron—The `GPP` command takes a Patron Barcode and attempts to find pending reservations that begin "close to" the current date. If a reservation is found, it's checked out to the Current Patron. The "close to" preference is days to look ahead when checking in reservations in Circulation Preferences.

Removing Patron Reservations

Use **Remove Patron Reservations** from the **Circulation** menu to remove reservations for the Current Patron. The patron's name is shown in the title of the window and a list of reservations for that patron is also shown.



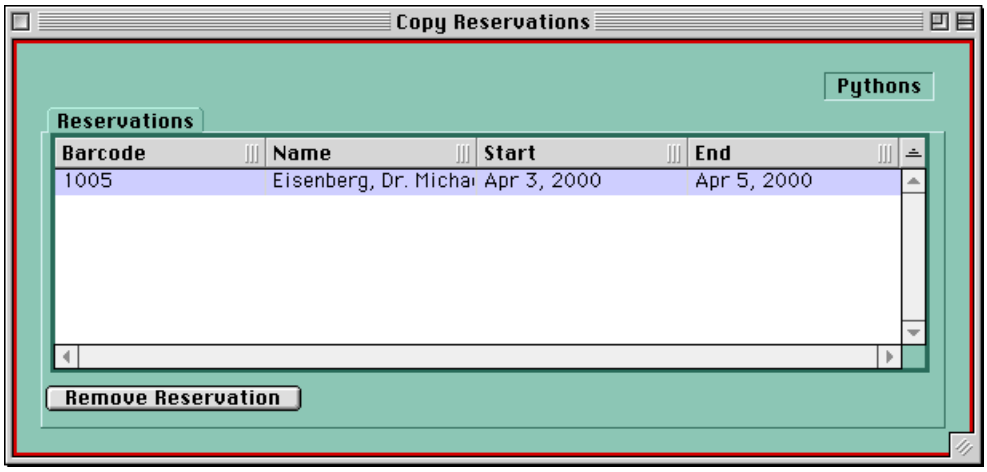
To remove a reservation, select the line you want to remove and click the **Remove Reservation** button.

W A R N I N G !

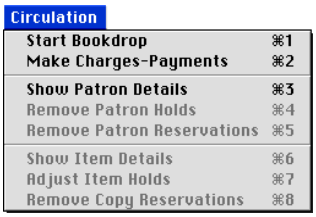
When you remove a reservation on this window, you cannot undo the remove. The only way to restore the reservation is to place a new reservation for the patron whose reservation was incorrectly removed.

Removing Copy Reservations

Use **Remove Copy Reservations** from the **Circulation** menu to remove reservations for the Current Item. The item appears in the title of the window and a list of patrons who have reservations this copy is also shown.



To remove a reservation, select the line you want to remove and click the **Remove Reservation** button.



Handling Charges and Payments

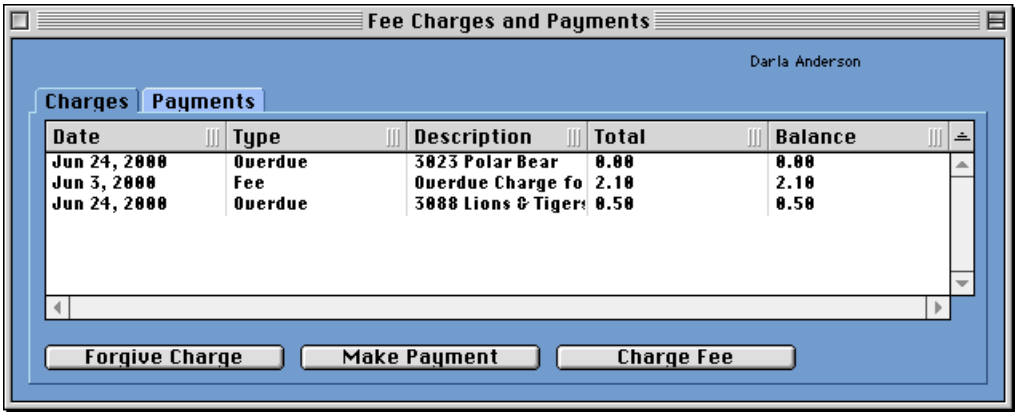
Use the charges and payments function to view the charges assigned to a patron for overdue items and fees assigned for special circumstances (such as lost items or loan fees). Alexandria calculates the amounts for overdue charges and fees based on the values entered in your circulation policies.

You can also use the charges and payments function to charge miscellaneous fees to a patron, to record the payments a patron makes, or amounts you have forgiven.

Viewing Charges and Payments

Command: `F`

Viewing Charges and Payments—To view the charges and payments for the Current Patron, type `"F"` and press <enter>, or choose **Make Charges-Payments** from the **Circulation** menu.



This window includes three tabs: **Charges**, **Payments**, and **Refunds**.

The **Charges** tab shows the charges currently assessed against the patron. Alexandria uses the following charge types.

- **Overdue—**Charges for overdue books that are still checked out. These charges are updated daily because the charge amount increases each additional day the book is overdue. You can enter a payment against this kind of charge without checking the book in.
- **Fee—**Charges for overdue books that have been returned, loan fees as specified in your circulation policies, or any additional charge such as reading club membership, damage to library books, etc.
- **Lost—**Charges for losing a library book.

The **Payments** tab shows the total payments received from this patron.

The **Refunds** tab shows the total refunds received by this patron.

Forgiving a Charge

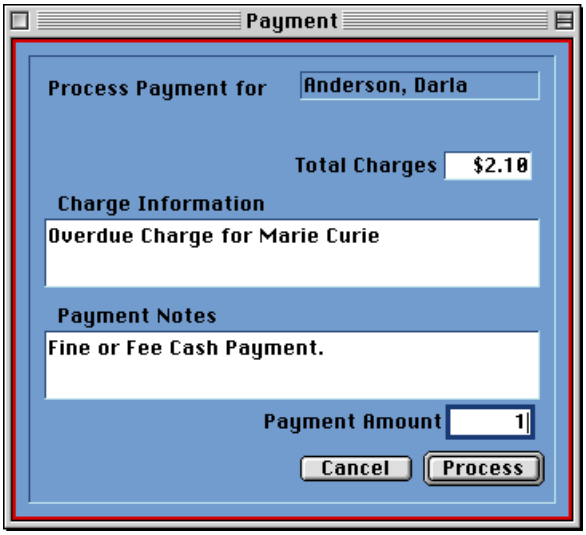
To forgive an entire charge, select the line and click the **Forgive Charge** button.

If you want to forgive only a portion of a charge, use the **Forgive Charge** button and enter the amount to forgive.

Recording a Payment

Use the following steps to process a payment or pay a portion of the charge.

Step 1. Select the line and click the **Make Payment** button. The **Payment** window appears.



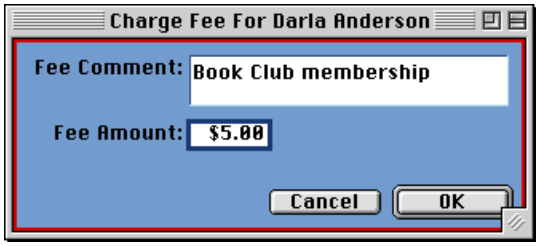
Step 2. In the **Payment Notes** field, enter notes concerning the payment. Perhaps if you reduced the charge (by modifying the Total Charges value), you would want to enter this information.

Step 3. Enter the amount the patron is paying in the **Payment Amount** field.

Step 4. Click **Process** to record the payment or **Cancel** to stop.

Charging a Fee

You may also Charge a Fee to the Current Patron by clicking on the Charge Fee button.



Charging a Fee

Command: `F {charge amount} {comment}`

Charging a Fee—Use the `"F"` command with an amount and optional comment to issue a charge against the Current Patron. For example, to assign a $10.00 charge for a library Reading Club membership, type `"F10.00 Reading Club"` and press `<enter>`.

Once you enter a charge, you can edit it if you make a mistake. In the **Make Charge Payments** window, select the **Charge** to edit and click on the **Edit** button. You can modify either the fee description or the amount except for overdue fees which are still accruing.

Inventory Control

Use the inventory function in Alexandria to keep track of your collection. An inventory identifies what items are contained in your library collection, which have been lost and which have been found.

Every item in your collection identified with a barcode number has an associated inventory date. This is the date on which you last noted that the item was seen in your library.

Alexandria automatically updates the inventory date for an item when it is checked out or checked in.

Taking Inventory

Command: `I{B} {inventory date}`
Inventory—Use the `"I"` command to update the inventory date on items. You can use the current date or you can enter a different date.

- To update items with today's date, type `"I",` then <`enter`>. To Inventory items`,` scan (or type) the barcode for the item and press <`enter`>. Each item whose barcode you enter or scan is updated with today's date.
- To update items with a date other than the current date, type `"I"` and the date you want to use for the inventory date, followed by the <`enter`> key. For example, to update items with an inventory date of September 1, 2000, enter `I 9/1/00`. Each item whose barcode you type or scan is updated with the date you entered.
- To perform automatic bookdrop on all checked out items scanned during inventory, use the optional `"B"` parameter. Thus, `"IB"` performs inventory using today's date. If a checked out book is inventoried, it's automatically book-dropped.

As you enter barcode numbers during Inventory mode, the transaction log displays the item and call number. If a call number is out of call number order, the transaction log marks those items with an `"Inv ??-->"` before the call number.

To exit Inventory mode, use the `"."` command (type a period and press <`enter` >).

Notes about Inventory

- You can inventory portions of the library at different times. When you run inventory reports, specify the date range over which you took inventory. All items inventoried during this date range will be included.

For example, if you take inventory over Spring break (April 21st through 25th), specify this date range when you run an inventory report. All items inventoried between April 21 and 25 will be included in the report. If you don't specify a date range, the reports will return all items regardless of when they were inventoried.

- You do not have to close the library to take inventory. Because the inventory date for an item is updated when the item is checked out, items checked out while you are taking inventory will have dates within the inventory date range. This is also true for items checked in during the inventory period.
- Items returned after you have completed inventory will automatically have their inventory date adjusted to the check in date, which will be after the date you take inventory. If you prepare an inventory report for all items with dates on or after the date you took inventory, these items will be included.

- To identify items missing from your collection, prepare an inventory report of non-inventoried items with the same dates as when you performed the inventory.
- If you are not using a portable reader when taking inventory and you enter an item barcode that Alexandria does not recognize, a window appears to let you add the new item.

Enter the Title and any other desired fields and click **Save**. This provides a quick way to add the new item and continue with your inventory task. You can add additional information for this item later using the **Items** window.

Inventory Reports

You can prepare inventory reports based on the inventory date and other criteria *(see page 292 for a list of Inventory reports)*. For example, you can generate an inventory report showing:

- Items inventoried or not inventoried within a specified date range.
- Lost items inventoried (which means the item is actually in the library even though it is marked as lost).
- Items within a specific section of your library.
- Items with a specific Funding Source.

Other Circulation Commands

The following commands are available on the **Circulation** window.

Set Self-Service

Command: `AS`
Command: `ASB`

This command logs out the current user and sets the user mode to Self Service Check Out (AS) or Self Service Bookdrop (ASB). To exit this mode and security level, select **Restart** from the **File** menu and log in under a different level. This mode can not be exited by using the `"."` command—it's a shortcut to change user levels.

Change Patron Location

Command: `NP {new location code}`
Change Patron Location—Use this command to change the location code for a number of patrons.

For example, to change a group of patrons to location code 1001, type `"NP 1001"` and press <enter>. This begins Change Location mode. You can now enter patron barcodes for those whose location code you want to change.

The transaction log will show the patrons for whom you've changed the location code.

When you have entered all the patrons for whom you want to the change location code, use the `"."` command to exit Change Location mode.

Change Copy Location

Command: `NC {new location code}`
Change Copy Location—Use this command to change the location code for a number of copies.

For example, to change a group of copies to location `LibLab`, type `NC LibLab` and press <enter>. This will begin Change Copy Location mode. You can now enter barcodes for the copies whose location code you want to change.

The transaction log shows the copies for which you have changed the location code.

When you have entered all the items for which you want to the change location code, use the `"."` command to exit the Change Copy Location mode.

Change Copy Collection

Command: `NO`
Change Copy Location—Use this command to change the collection code for a number of copies.

For example, to change a group of copies to location `LibLab`, type `NC LibLab` and press <enter>. This will begin Change Copy Collection mode. You can now enter barcodes for the copies whose collection code you want to change.

The transaction log shows the copies for which you have changed the collection code.

When you have entered all the items for which you want to the change collection code, use the `"."` command to exit the Change Copy Collection mode.

Change Barcode Number

Command: `/ {old barcode=new barcode}`

Change Barcode Number—Use this command to change barcode numbers for patrons or items while performing other tasks within Alexandria. For example, if you are checking-out items, you can change their barcode numbers as you check them out. If you are performing inventory, you can change the barcodes as you inventory the items.

This command changes the barcode number and then enters a new barcode number in the command line. This means you can change the barcode number and continue with the activity you were performing.

For example, suppose you are checking in items and come across one with barcode number **3009**, but the barcode label is damaged. You can place a new barcode label on the item with barcode number of **9000**. To do this, while still in Check In/Out mode, type `"/3009=9000"` in the command line. Alexandria changes barcode **3009** to **9000** and enters **9000** into the command line, which will check in the book.

You can use this command to change patron barcodes as well as item barcodes.

Start Statistics Mode

Command: `Y`

Start Statistics Mode—Use this command to record items as being used, without checking them out. If certain items in your collection are often used without being checked out, use this command to collect better statistics about library usage.

As Alexandria collects statistics on an item, it counts a check out as usage of an item. However, there are many times when an item is used, but is not checked out. For example, books left on tables in the library at the end of the day were probably used even though they were not checked out. You can enter these item barcodes before re-shelving them and they will be marked as used for the purpose of collection statistics.

When you enter a barcode under this command, the item usage statistics and time-based statistics are updated, and the item is marked as "used" in the transaction log.

To use a portable reader to record used items, enter `"Y"` on the command line and then scan the used item's barcodes.

Change Item Policies

Command: `UI {new policy code}`
Change Item Policies—Use this command to quickly change the policy codes for a number of copies. For example, suppose you want to mark a number of copies for overnight check out exclusively during the next two weeks. You could quickly create a policy for overnight check out and then use this command to change the policy for those special copies.

Alexandria saves the old policy so you can restore it later using the Restore Previous Policy command. In the above example, at the end of the two weeks, you could restore the original policy.

Change Patron Policies

Command: `UP {new policy code}`
Change Patron Policies—Use this command to quickly change the policy codes for a number of patrons. This command works for patron policies exactly like the "`UI`" command (explained above) works for copy policies.

Restore Previous Policy

Command: `UR`
Restore Previous Policy—Use this command to quickly change patrons or copies back to their previous policy.

Start Classification Mode

Command: `V [Type] [Keyword]`
Start Classification Modes—Use this command to quickly add searchable terms to the items you scan.

Let's say you want to create a reading list on Utah skiing. You would enter the command "`V B Utah Skiing`" in the Command Line and press <enter>. Alexandria would display **B*Utah Skiing** above the Command Line. Any item you enter when in this mode would have the Bibliographic keyword "Utah Skiing" assigned to it. To end the Classification mode, enter the "`.`" command in the Command Line. Once an item is classified, it can be searched for using the **Search** window.

You can further examine and manipulate keywords you've added using the **Utilities** command under the **File** menu.

Valid types include:

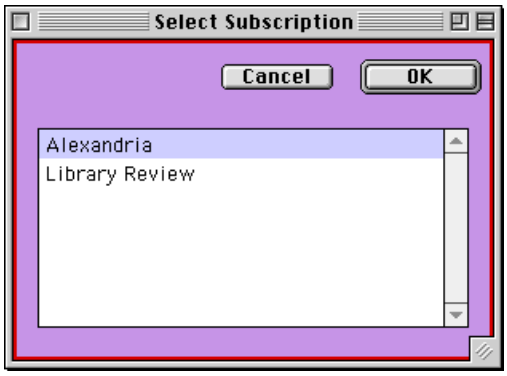
S — Subject	**R —** Study Program
C — Curriculum	**P —** Point Count
I — Interest/reading level	**T —** Test Number
B — Bibliography	**H —** Holding Code

Select **Search** from the **Show** menu to search for the items you've classified using this command. In fact, if a patron were searching for items on "Utah skiing," those items would appear on any search performed after you classify the item.

Receive Subscription

Command: `E [Subscription Name]`

Receive Subscription—Use this command to record that the library has received a subscription. If the subscription name doesn't exactly match the name you used in the subscription management window, you'll see the following window:



In this example, `Alexandria` is selected.

This item is recorded as **Received** and we can see how many issues remain in the subscription by reading the transaction log. The item will be added into inventory and assigned a barcode number if is set for that subscription.

Using the **Receive Subscription** command is the best way to record that you've received subscriptions.

Renew All Items

Command: `RA`

Renew All Items—When you have a current patron, this command renews all items for that patron.

Renew Query

Command: `QE`

Renew Query—Brings up a list of all the books checked out to the current patron, allowing you to choose which books to renew.

NOTE:

Since this command prints a routing slip, you should have your printer turned on when you use this command.

Issue Routing Slip

Command: `M [Route Name] {=Item barcode}`

Issue Routing Slip—This command will issue a routing slip with the given route name. Thus, the command "`M STAFF=3092`" will issue the STAFF routing slip for item **3092**. In other words, Alexandria will check out item **3092** to the responsible patron and print STAFF routing slip.

If you don't include an item barcode number, a TOC (Table of Contents) routing slip will be printed.

This command can be used to print a routing slip for any item in the collection. Normally, routing slips are only issued when a new subscription is received. With this command, you can print a routing slip for any item.

For example, let's say you've been asked to route a number of items on a particular topic. You would first create a route with the appropriate people assigned. You can then locate all the items and use the **Routing Slip** command for each item.

Read Transaction file

Command: *

Read Transaction File—In addition to entering transactions by typing or scanning them into the transaction command line, Alexandria allows users to process transactions saved in a text file. These text files can be created by COMPanion's portable readers or by any program that creates a text file.

Use this command and select the file to read. When the file is imported, Alexandria processes the commands in it as if the user entered them one at a time.

- NOTE -

While processing commands via a transaction file, Alexandria does not alert you to unusual circumstances. Instead, Alexandria takes whatever action it determines is the most appropriate. After reading a transaction file, be sure to check the transaction log for any possible problems or alerts.

Since this function is typically used for recording inventory scans, Alexandria defaults all transaction files to begin with the Inventory command. If you are using a transaction file for purposes other than inventory, you MUST use an appropriate command in the file.

You can also drag and drop these files into the transaction window or use the **Import** command if they have the proper transaction file header[1]. Alexandria "recognizes" they are transaction files and will process them automatically.

1. Alexandria headers begin with "`###`" for example, SmartScan files begin with "`### SmartScan...`"

Importing Portable Laser Scanner Inventory Files

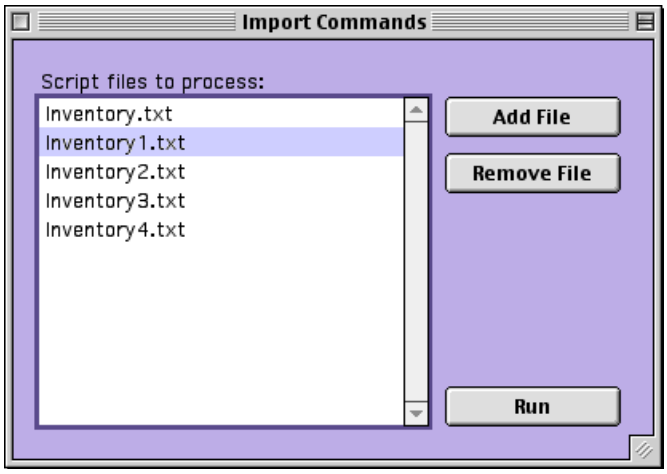
If you're using a portable laser scanner for inventory purposes and have HotSynced (downloaded) that inventory data to your hard drive, use the following steps to import the data into Alexandria *(refer to your SmartScan User's Manual for more details)*.

Step 1. Firstly, make sure to backup your *current* Alexandria data.

Step 2. Use the `"*"` command followed by `<enter>` in the Circulation Window to open the **Import Commands** window.

Step 3. Use the **Add File** button to add inventory files to the **Script files to process** field. If you are downloading several inventory files before importing them (see the example below), make sure you are renaming the files or moving them to different directories so that they do not have the same name and they do not get replaced.[1]

Step 4. Once the inventory file you want imported from the **Script files to process** field is highlighted, click the **Run** button to begin import.



Step 5. Your data is now imported into the Alexandria database.

1. Refer to the SmartScan manual.

Advanced Bookings

This chapter describes the Advanced Bookings feature supported in Alexandria. Advanced Bookings capabilities are available as a separately priced Alexandria module.

> **- NOTE -**
>
> Advanced Bookings is an optional feature of Alexandria. You must purchase a separate license to use this feature.

Advanced Bookings greatly enhances the reservations capabilities provided within Alexandria. This feature is valuable when Alexandria is used for managing centralized media centers that process numerous requests each day. When you have purchased the Advanced Bookings module, there will be two changes to your Alexandria program.

1. You'll have the **Advanced Bookings** preferences activated. As part of the Advanced Bookings enhancement, this preference allows the administrator to customize the reservation notices sent.

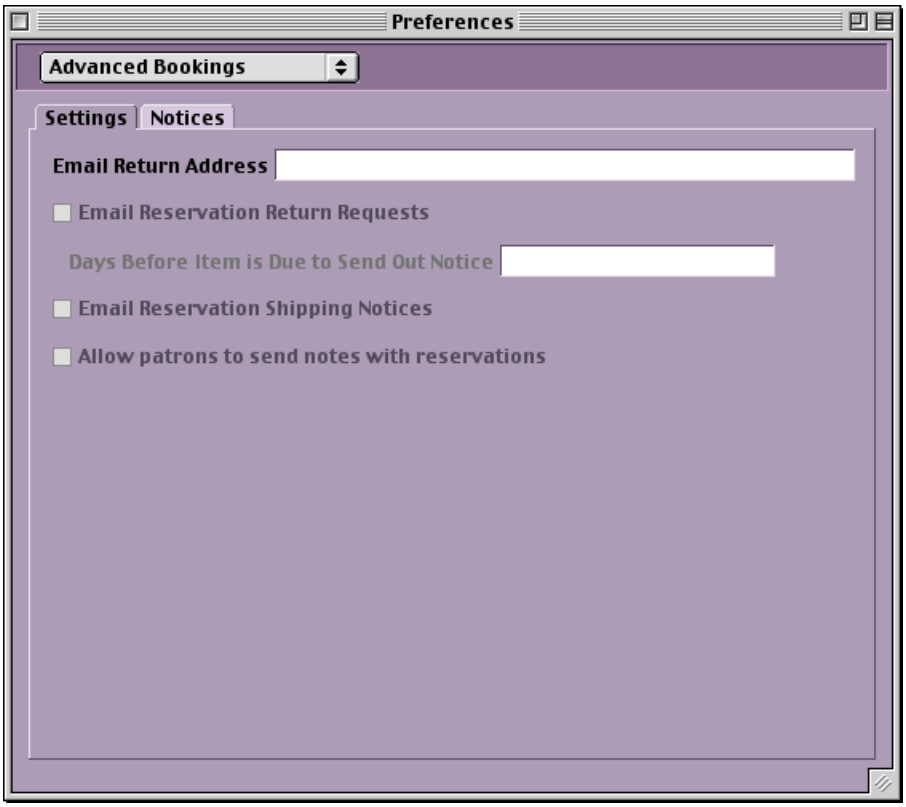
2. Two new selections will appear at the bottom of your **Circulation** menu. These will provide all the advanced capabilities supported in the Advanced Bookings option.

To use Advanced Bookings, place reservations using Alexandria as you normally would. Patrons can place their own reservations, or librarians at a central site can place them.

The Bookings administrator will run the **Advanced Bookings** process once every day. They will also run the **Process pending Bookings** function to "catch" Bookings that could not be processed during standard processing.

Settings

The **Email Return Address** you enter in this window is used for all Advanced Bookings Email notifications.

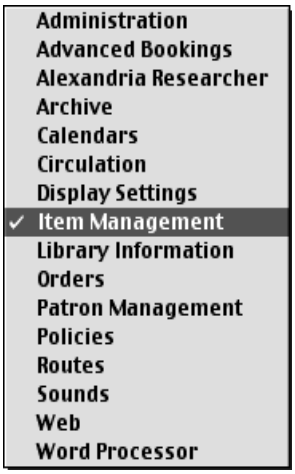


Check the **Send Reservation Return Requests** box to automatically send notification to patrons who have items checked out, letting them know when they're due back. Use **Days Before Item is Due to Send Out Notices** to set how many days before the item's due date to send out a message.

Check the **Send Reservation Shipping Notices** box if you want to automatically send Email notification to users that their item reservation is in route to them. When selected, Alexandria will send an Email notification for each reservation checked out to a patron. This Email will contain the **Reservation Shipping** text you created in the Advanced Bookings preferences.

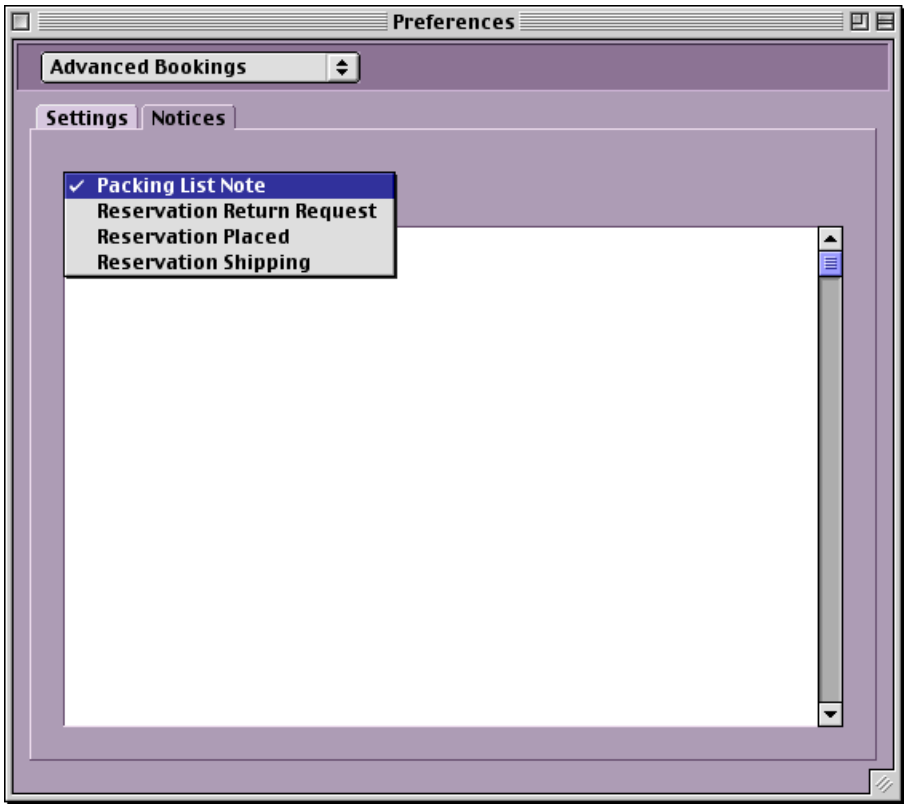
Other preferences that affect **Advanced Bookings**:

Policies
Calendars
Circulation
Library Information
Alexandria WEB (if purchased)
Alexandria Researcher (if used)



Advanced Bookings Preferences

If you have purchased the Advanced Bookings options, this preference will be available.



Notices

This preference allows the Administrator to customize the text used on various Bookings notices. If you click the **Set Default** button, the current Notice will be used as the Alexandria default.

Packing List Note—This note is placed at the top of the Advanced Bookings packing list.

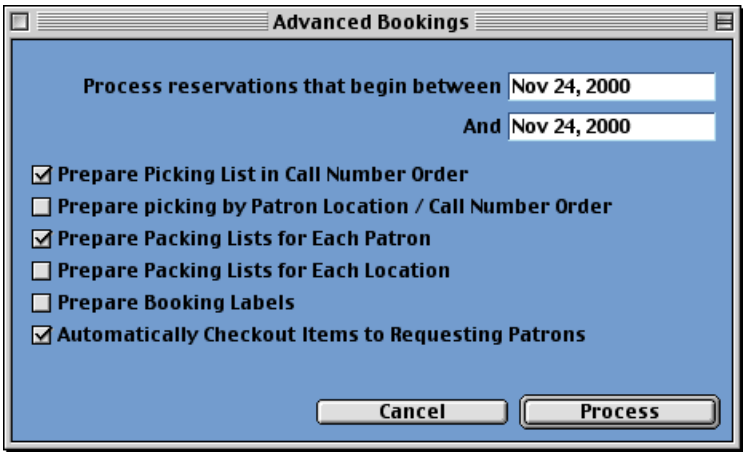
Reservation Return Request—This notice is used as the body of the letter for a Reservation Return Request. When Email notification is turned on, these requests are automatically sent via Email.

Reservation Placed—This notice is used as the body of the notification sent to patrons who have placed reservations.

Reservation Shipping—This notice is used as the body of the notification sent to patrons who have reservations pending. This notice is sent out when a reservation has been filled.

Advanced Bookings

Every day that reservations begin, the administrator will select **Advanced Bookings** from the **Circulation** menu.


Advanced Bookings
Process reservations that begin between
Nov 24, 2000
And
Nov 24, 2000
Prepare Picking List in Call Number Order
Prepare picking by Patron Location / Call Number Order
Prepare Packing Lists for Each Patron
Prepare Packing Lists for Each Location
Prepare Booking Labels
Automatically Checkout Items to Requesting Patrons
Cancel
Process

The Advanced Bookings process is performed for reservations that begin on, or between, the dates selected. In order for the system to know when items are returned, all returned items must be checked in before they are put away. Use Alexandria's **Bookdrop** to return items.

NOTE:

Reports are prepared based upon Reservation Requests only. Once an item is checked out to a patron, it will not appear on these reports.

Check the desired options and click the **Process** button. Once the process is completed, reports can be examined, saved, and/or printed. If you're unsure about what reports you need, prepare them all until you find a report that works best for your operation.

Prepare Picking List in Call Number Order—This option prepares a list of reservervations in Call Number order. Use this list to quickly fetch items from your collection.

Prepare Picking by Patron Location/Call Number Order—This option prepares a list of reservations by Patron Location, then Call Number order. For each Patron Location or Call Number, the list is further sorted by Patron. This report is useful for larger operations, where more than one person may be filling orders. It also helps with sorting the reservations for delivery.

Prepare Packing Lists for Each Patron—This option prepares a packing list for each patron with a reservation beginning within the specified dates. If customers often place reservations several items, the packing list will help in making sure each patron receives the items requested. The packing list also contains the **Packing List Note** which you specify in the Advanced Bookings preference.

Prepare Packing Lists for Each Location—This option prepares a packing list for each Patron Location. Each Location begins on a new page and is then further sorted by Patron for that Location. This allows central sites to collect items for shipping to a common location.

Prepare Booking Labels—This option prepares booking labels (for attachment) to each item shipped. Standard Alexandria labels are supported to reduce confusion and cost. Booking labels are prepared in a three-across format: Address Label — Item Info — Patron Info

NOTE:

Run any Reservation Reports under Circulation Reports before you run Advanced Bookings with the **Automatic Check Out** selected.

Booking labels are used to address items for delivery to the requesting patron. Each row of labels contains unique information. The first label contains delivery information, such as the Patron, their Location and Address.

The second label contains Item Information, Call Number, Barcode Number, Barcode Image, Reservation Begin/End dates. The third label contains Patron Information, Name, Location, Barcode Number, Barcode image, Item Barcode Number, Item Reservation Begin/End dates.

Automatically Check Out Items to Requesting Patrons—When selected, Alexandria will automatically check out each available reservation to the appropriate patron.

Once a reservation has been checked out, it's no longer a reservation; it becomes a loaned item. Alexandria doesn't differentiate between items which have been loaned via reservation, walk in, or a satisfied hold, or any other way an item can be borrowed. Thus, if Alexandria checks-out an item that *should* be in inventory, but can't be found, an exception occurs.

If these exceptions happen frequently, another way to process reservations is to print all the reports, and once the items are physically allocated to a patron, check them out using Alexandria's standard Circulation commands *(see "Reservations Check Out, by Item" on page 183).*

Unavailable items report—This report is always generated for Advanced Bookings when items are unavailable for check out. It contains a list of all items sorted by Call Number, for which a reservation is pending, but the item has not yet returned to stock.

Exceptions Happen, what do we do?

With any automated process, there are always things that go wrong. Use the following section to help deal with these conditions.

If the item is **not** available at the time of processing or the system shows that the copy requested is not available for this reservation, perhaps the previous patron did not return it. Or perhaps it was returned, but not checked in.

In any case, Alexandria doesn't know anything other than the item isn't available.

If an item is unavailable when your lists are prepared, Alexandria will mark all unavailable items. When you run the **Process Pending Bookings** command, Alexandria checks to see if any of the unavailable items have become available. If they have, they're automatically assigned to the requesting patron.

If an item doesn't become available, and no alternatives are located, there is nothing Alexandria can do but wait. The reservation will remain pending until its end date; after which, it's removed by the system.

Another problem occurs when an Item is not located at the time of reservation. Alexandria thinks the item is available, but it's not. This can only be discovered when someone tries to find the physical item for the requesting patron. The item could be misfiled, lost, or borrowed without check out. In any case, the item should be checked in so the requesting patron isn't responsible for returning something they never received; and then the item should be declared **Lost** so that other patrons will not place reservations on it. Hopefully, an alternative selection can be located for the patron.

Searching

This chapter explains how to search Alexandria library collections. Using the search window, users can search a local collection or authorized sites over a wide-area network.[1]

Searching functions are available on the Alexandria Data Station, Librarian Workstation, Researcher Workstation, and various Web Browsers.[2]

The Search Window

Because Patrons have different skill levels and requirements, the Alexandria search window has numerous interfaces for searching. You can select a default Search interface via the Alexandria Researchers preference window that best meets the needs of your Patrons*((see "Alexandria Researcher Preferences" on page 69))*.

- Using the **Boolean** interface, patrons can choose the collection to search, the search type (e.g. subject or title), enter a search string, use Boolean operators to narrow the search, and use the **Dictionary** button to list the items in the collection that closest match the search values. This is Alexandria's primary Catalog Query tool. If you are an experienced user, you'll typically want to use this interface for all your searching *((see "Boolean Search" on page 206))*. This is the only interface that is used for Alexandria WAN.
- The **Simple** tab is for younger patrons or those who do not have strong English language skills. It requires the user to enter a search string, then click a graphic to perform the search *((see "Simple Search Window" on page 209))*.
- The **Dictionary** tab is useful for patrons who want to "browse" categories for things that interest them. Type a term, click on the search button, then select the terms you want from the list *((see "Dictionary Search Window" on page 210))*.
- The **Study Program** tab is useful for patrons who are using study programs such as Accelerated Reader or Reading Counts. It allows the user to search the collection based on the study program name, reading levels, points, subject, and keywords *((see "Study Program Search Window" on page 211))*.
- The **Explore** tab provides a fully iconic interface that can be created by the Librarian for quick access to specific library resources. Since this option must be purchased separately, it's documented in the "Alexandria Explore" starting on page 231.
- The **Z39.50** tab provides access to other collections provided you have an internet connection. The other collections must also have Z39.50 server capabilities. The Librarian must configure the Z39.50 entry for each library with the catalog address, name, and port.

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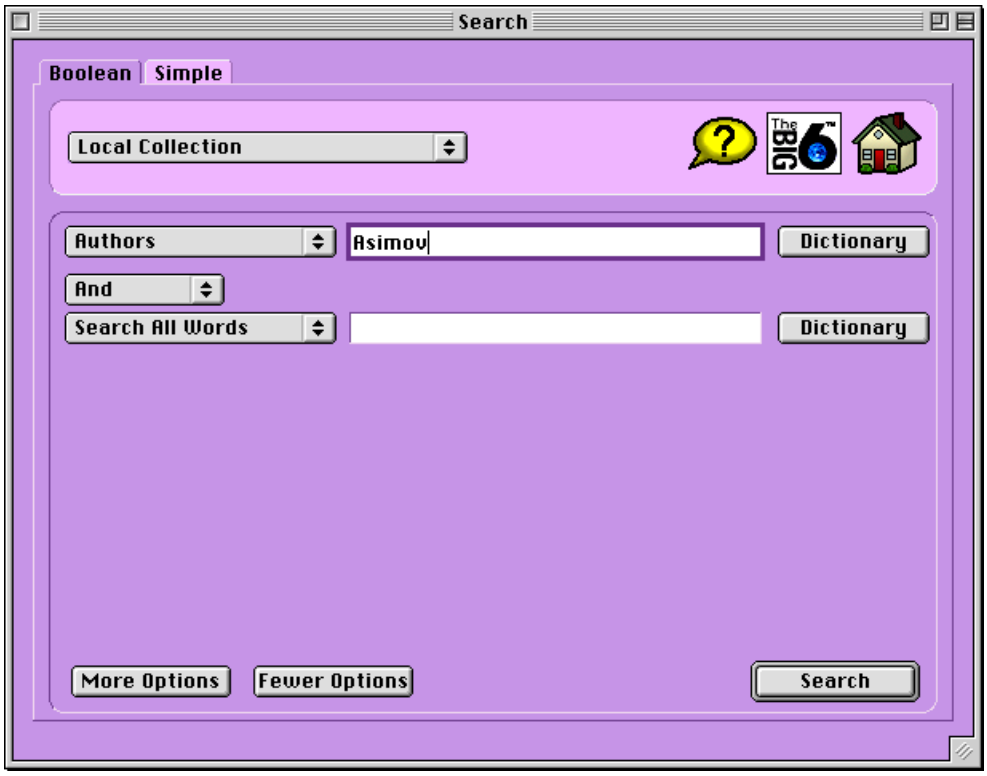
1. Access to Wide-area Network sites requires an **Alexandria WAN** license and *must* be configured on your Data Station.
2. If you've purchased **Alexandria WEB**, your patrons can search your collection via web browser by entering the IP address of the Data Station as a URL into the browser location field.

Boolean Search, Overview

Use the **Boolean** tab to search your collection or other collections for which you have access. To view the **Boolean** tab, select **Search** from the **Show** menu.



The following is the general procedure for **Boolean** searching. The remaining sections of this chapter provide more detailed information about different searching procedures.

Step 1. **Choose the collection to search**.
The pull-down menu in the upper left corner of the window displays your local collection. To search a different collection, click the arrow in this pull-down menu and make a selection. Unless you've purchased the WAN option (or are using a multi-collection license), only your library (**Local Collection**) will be listed in the field.

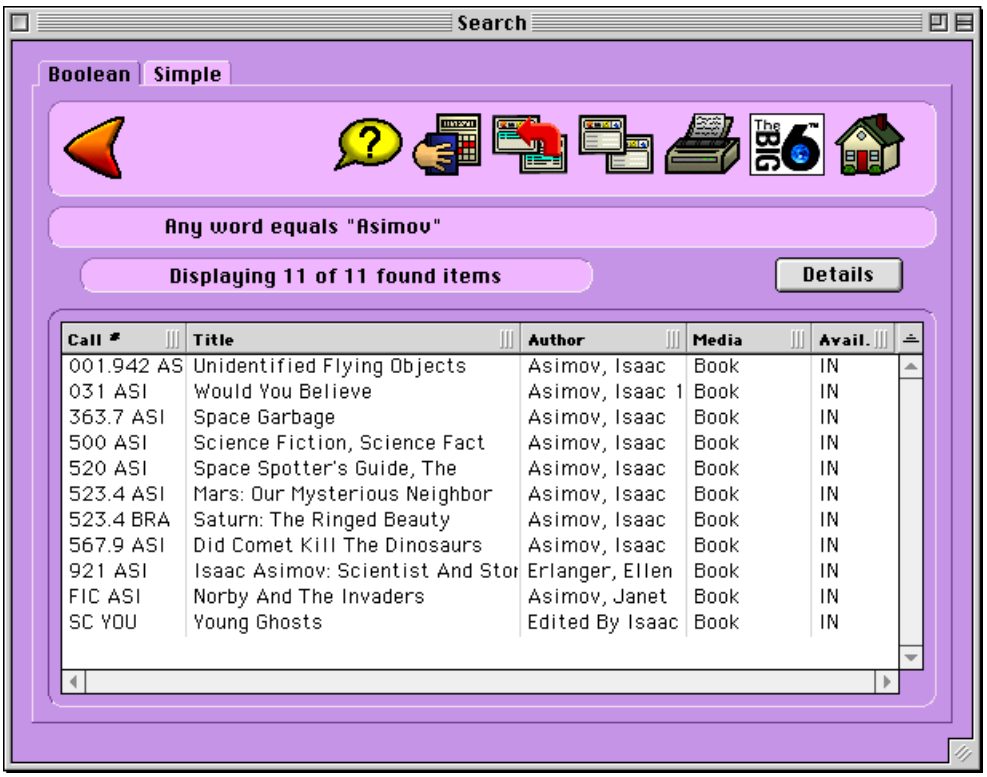
Step 2. **Choose the type of search**.
Use the **Search All Words** pull-down menu on the left of the window to choose the kind of search you want to perform. For example, you can choose to search Authors, Titles, or Series.

Step 3. **Enter a search word or phrase**.
In the field next to the search pull-down menu, enter your values. For example, if you want to search by Title, enter all of the title (or the first part of the title) which you want to search. You can use special characters or Boolean operators (**And**, **Or**, and **And Not**) to narrow your search. You can also use the **Dictionary** button to show a list of items in the collection that match your search values.

NOTE:

If you notice that you have some mistakes in a title or record, you can hold down the `ALT (PC)/ Option (Mac)` key on the title and double-click to have the **Item Management** window open.

Step 4. **Use the results of the search**.
The search results are shown in the **Search** window.


Search
Boolean
Simple
Any word equals "Asimov"
Displaying 11 of 11 found items
Details
Call #
Title
Author
Media
Avail.
001.942 AS Unidentified Flying Objects Asimov, Isaac Book IN
031 ASI Would You Believe Asimov, Isaac 1 Book IN
363.7 ASI Space Garbage Asimov, Isaac Book IN
500 ASI Science Fiction, Science Fact Asimov, Isaac Book IN
520 ASI Space Spotter's Guide, The Asimov, Isaac Book IN
523.4 ASI Mars: Our Mysterious Neighbor Asimov, Isaac Book IN
523.4 BRA Saturn: The Ringed Beauty Asimov, Isaac Book IN
567.9 ASI Did Comet Kill The Dinosaurs Asimov, Isaac Book IN
921 ASI Isaac Asimov: Scientist And Stor Erlanger, Ellen Book IN
FIC ASI Norby And The Invaders Asimov, Janet Book IN
SC YOU Young Ghosts Edited By Isaac Book IN

- To change how the list is sorted, click on the column heading (i.e. **Call#**, **Title**, **Author**, **Media**, etc).

- To view details for an item (including attachments), double-click on an item in the Results List or select the item and then either press the `<enter>` key or click the **Details** button.

- To save items from the Results List, select them and click the **Save List** icon shown below (*see (see "Creating your own Custom Results Lists" on page 213) for more details*).

- To place a Hold or Reservation on an item, select it and click the **Hold - Reservations** icon shown below *(see page 216 for more details)*.

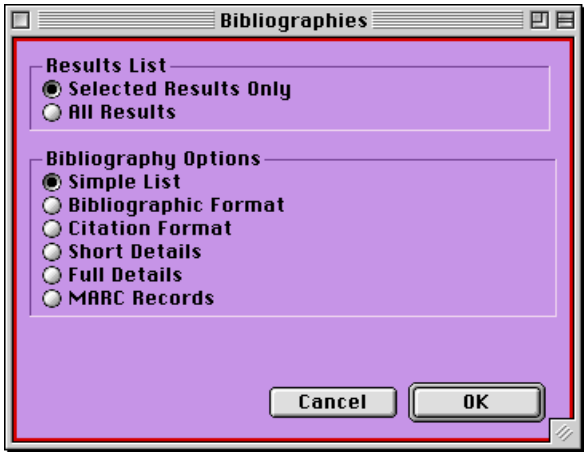
- To print the search results list, click the **Print** icon shown below or select **Print** from the **File** menu (*see (see "Result List Printing Options" on page 205) for more details*).

Search Window Control Icons

	Home Resets the window for a new search.
	Big 6™ information Displays information on the **Big 6™** research method.
	Print Prints the contents of the search window.
	Duplicate Window Duplicates the current window.
	Save List Creates a **Save List** for the selected titles of a Results List.
	Hold or Reservation Use this icon to place a **Hold** or **Reservation** on a selected item.
	Help Shows **Searching Help** information.
	Back Returns to the previous window.
	Previous - Next Shows the **Details** for the **Previous** or **Next** record in the results list.

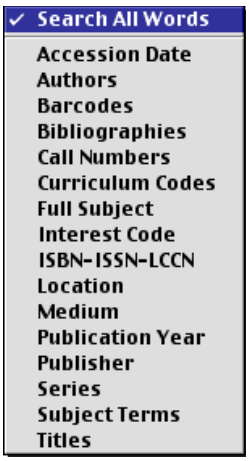
Result List Printing Options

When you select **Print** from the **File** menu or click the **Print** icon when a Search Results List is showing, the following window appears.



If you've selected items from the Results List, you have the option to click the "**Selected Results Only"** radio button if you want your report to include *only* the selected items from the Results List. Otherwise, the report will include **All Results** from the Result List. Printing formats include:

- **Simple List—**Shows only the data in the Results List.
- **Bibliographic Format—**Shows a numbered Bibliography.
- **Citation Format—**Shows Titles in a Citation format.
- **Short Details—**Shows key data for each title.
- **Title Details—**Shows all Title information.
- **Marc Records—**Shows Marc records for each title. These Marc records may be saved and imported into Alexandria.



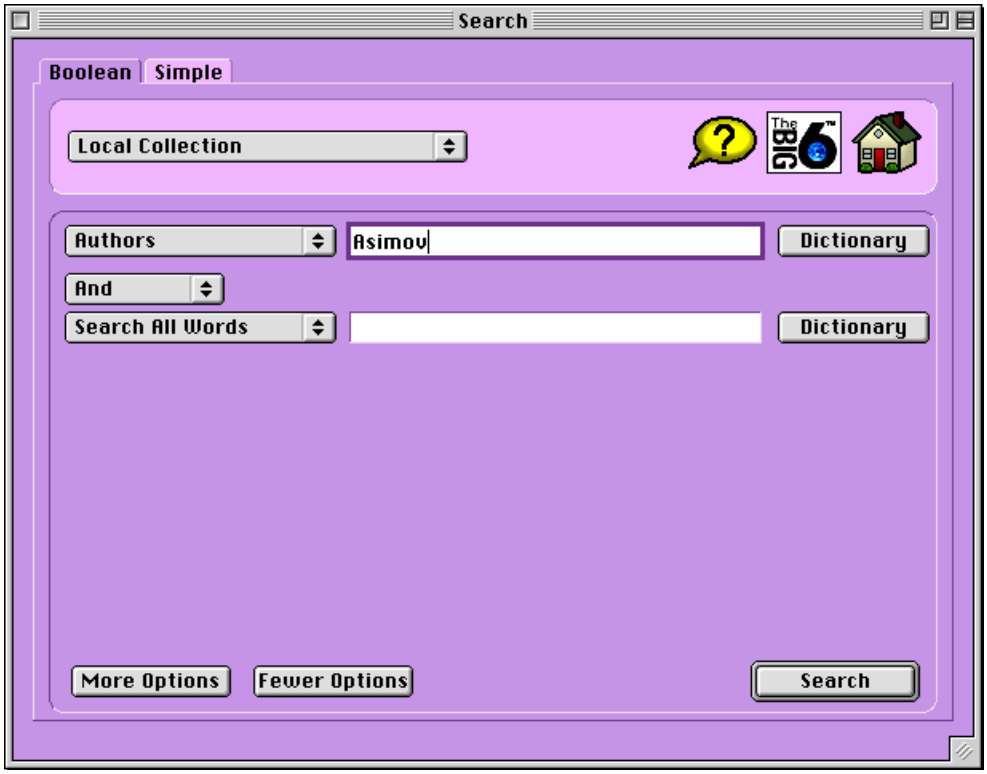
Boolean Search

Use the **Search All Words** pull-down menu on the left of the window to choose the type of search you want to perform. For example, you can choose to search Authors, Titles, or Series.

Alexandria searches the values of Marc records saved for each title. For example, when you choose to search Authors, Alexandria searches for Authors in the **100** and **700** Tags.

A search returns a maximum of 500 items unless holding down the `<alt>` or `<option>` key when clicking on **Search**. If the item you are looking for isn't found in the list, you may have to further narrow your search criteria *(see page 70 for information on changing this preference)*.

Use the **More Options** and **Fewer Options** buttons to display menus for additional or fewer search values. Alexandria supports up to 6 levels of searching using this interface.



When searching by single words or phrases, you can use the following special characters to narrow the searching criteria.

- End a word with a period (`"!"`)—this tells Alexandria to perform an exact match search for the word.
- Start a word with a question mark (`"?"`)—this tells Alexandria to look for words that sound like the word you've entered.

If you enter a single word, Alexandria searches for words or phrases beginning with the text you enter. However, if you end the text with a period (`"!"`), Alexandria only searches for data that matches your text exactly. For example, if you enter `"child"`, Alexandria searches for all words beginning with "child", which includes "child" or "children." If you enter `"child!",` Alexandria only searches for the word "child."

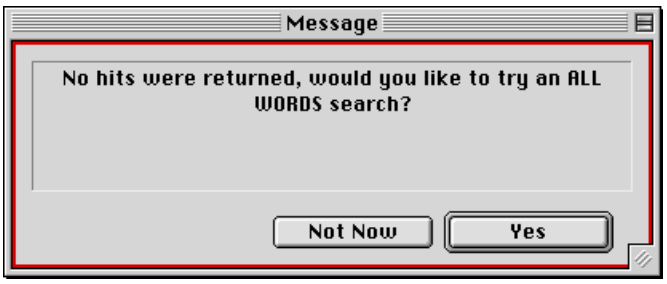
If you don't know how to spell a word, enter the word preceded by a question mark. Alexandria then performs a "Sounds-Like" (phonetic) search.

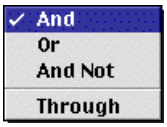
You can set preferences in the Librarian Workstation to automatically prompt Patrons to do a "sounds-like" search if the initial search fails to find results *(see "Alexandria Researcher Preferences" on page 69)*.

When you enter *more* than one word as an **All Words** search, Alexandria does the following:

Step 1. Alexandria will perform a search with each word in the phrase, looking for any item that includes all the words. If no match is found, Alexandria will ask you (if the preference is turned on) if you would like a "Sounds-Like" search. If selected, this performs a phonetic search for the words you've entered.

When performing searches *other* than **Search All Words**, Alexandria will search for items that begin with the term you've entered. If nothing is located, Alexandria will ask you if you'd like to perform an **All Words** search. If you answer **Yes**, Alexandria will look for records which contain *all* the words in your query. Finally, if your preferences allow, it will prompt you for a sounds-like search.





Using Boolean Operators

Alexandria supports Boolean operators (**And**, **Or**, and **And Not**) for all selections; and a range operator (**Through**).

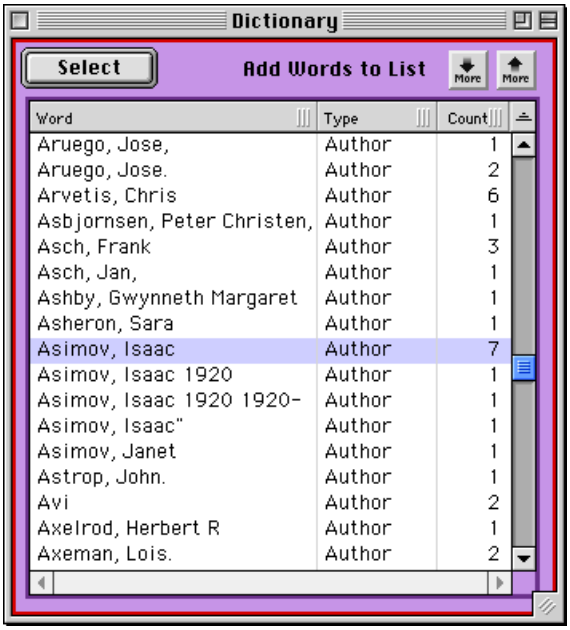
It is recommended that you start with the most general searches first (usually joined with **Or**) and more specific searches last (usually connected with **And**).

Alexandria builds its Boolean query from the top down. Thus, entering `"Animal"` **AND** `"Fish"` **OR** `"Cat"` creates the Boolean expression: **`(Animal AND Fish)`** OR **`(Cat)`**. If what you want is **`(Fish OR Cat) AND (Animals)`**, enter `"Fish"` **OR** `"Cat"` **AND** `"Animals."`

Using the Dictionary

To the right of the search criteria field is the **Dictionary** button.

Click the **Dictionary** button to show a list of items in the collection you are searching that match the search values you entered for the selected index. If you have not entered values in the Search Criteria Field, the list will begin with the first item in your collection.



To copy a word from this window to the Search Criteria Field on the **Search** window, double-click on the word. The word you select appears in the Search Criteria Field of the **Search** window.

For example, if you select `"Asimov, Issac"` (Author) in the above window, the **Search** window appears with `"Asimov Issac"` in the search value field.

If you are searching for a particular index-type, only entries of that type display in the list. For example, if you select **Search Subjects**, only index-type **Subjects** appear.

Simple Search Window

Use the **Simple** tab to search your collection using an easier interface than the Boolean search.

Enter a search string in the **Search For** field, then click a graphic to choose the search type. The Results List appears with all items in your collection that match the search string and type. In general, the Results List for the Simple Search operates exactly like the **Boolean** Results List; however, you can change it to a different results list format in your preferences.

If you type a value and press <enter>, Alexandria will perform an **All Words** search.

Dictionary Search Window

Use the **Dictionary** tab to search your collection using specific terms.

To perform a Dictionary search, perform the following steps:

Step 1. Enter a term in the field provided. In the above example, "`asimov`" was entered.

Step 2. Click on a index-type button. In the above example, **Author** was clicked.

Step 3. Examine the results. Alexandria shows a list of terms centered around the one you selected. In the above example, Authors are shown with **Asimov** in the middle.

Step 4. Highlight the term(s) you want to search by clicking on their line(s). You can `<command>`-click more than one line.

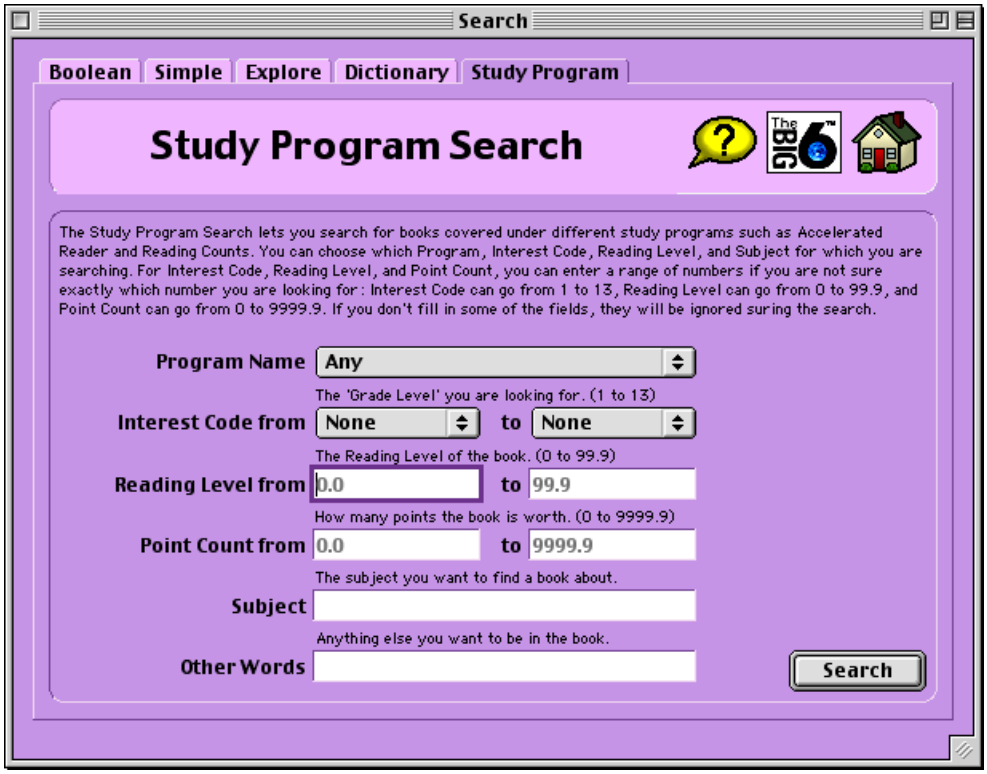
Step 5. To perform a search, press `<enter>` on your keyboard, click the **Author** button again, or double-click one of the selected terms.

Step 6. Alexandria will perform the search and display a Simple Results List *((see "Simple Search Results List" on page 215))*.

Dictionary searching is useful when you don't know the exact terms that you want to search. It allows you to view a term before performing a search.

Study Program Search Window

Use the **Study Program** tab to search your collection for items which have been classified in a study program such as Accelerated Reader.


Search
Boolean
Simple
Explore
Dictionary
Study Program
Study Program Search
The Study Program Search lets you search for books covered under different study programs such as Accelerated Reader and Reading Counts. You can choose which Program, Interest Code, Reading Level, and Subject for which you are searching. For Interest Code, Reading Level, and Point Count, you can enter a range of numbers if you are not sure exactly which number you are looking for: Interest Code can go from 1 to 13, Reading Level can go from 0 to 99.9, and Point Count can go from 0 to 9999.9. If you don't fill in some of the fields, they will be ignored during the search.
Program Name
Any
The 'Grade Level' you are looking for. (1 to 13)
Interest Code from
None
to
None
The Reading Level of the book. (0 to 99.9)
Reading Level from
0.0
to
99.9
How many points the book is worth. (0 to 9999.9)
Point Count from
0.0
to
9999.9
The subject you want to find a book about.
Subject
Anything else you want to be in the book.
Other Words
Search

To perform a Study Program search, perform the following steps:

Step 1. Select a Study Program name from the **Program Name** pull-down menu. **Any** selects all items with study program tags. **Other** selects programs other than **Accelerated Reader** or **Reading Counts**.

Step 2. Select a range of interest codes. If you don't care about interest codes, select **None**.

Step 3. Enter a range of reading levels. If you enter only one value, only that value will be searched.

Step 4. Enter a range of point counts. Only those items with a point count range you select will be chosen.

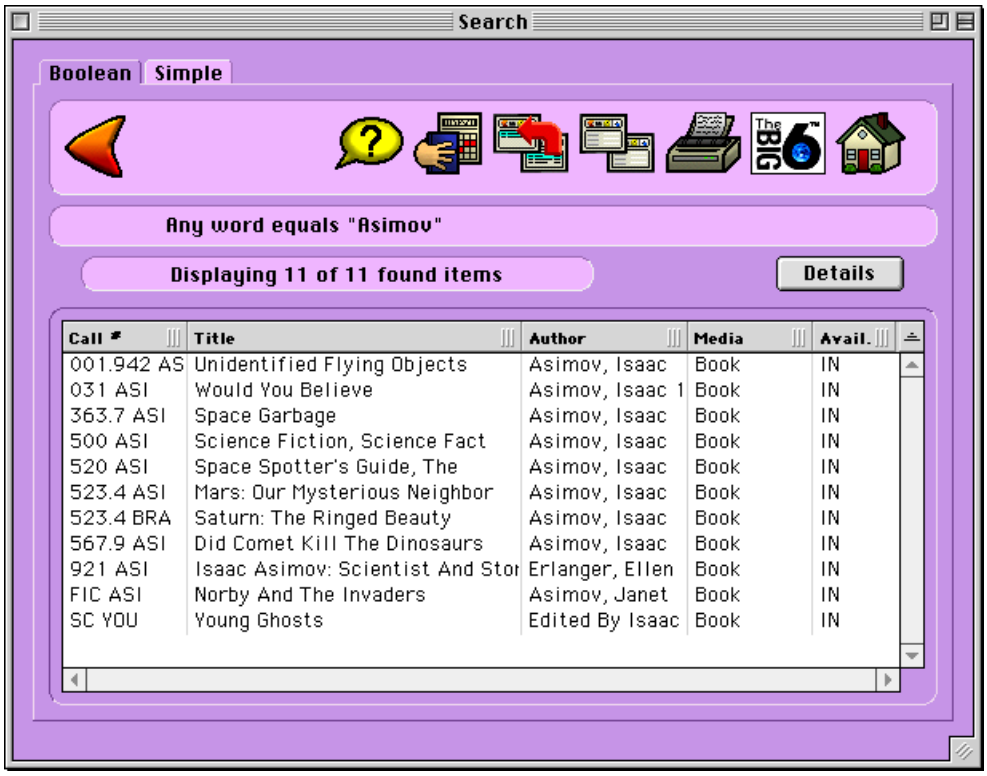
Step 5. You can additionally select study program items with a specific **Subject** term, or enter any **Other Words** you want in the selected records.

Step 6. Click the **Search** button, or press `<enter>`.

Step 7. Alexandria will perform a search and show a Results List containing all the records which contain all the specifications you've provided *((see "Simple Search Results List" on page 215))*.

Standard Search Results List

Depending on the type of search performed and your preferences, Alexandria will show a Results window when your search is completed. The top portion of the window displays a summary of the search, followed by the number of items found. Alexandria may display the **Results List** before it completely puts all the results in the list.



The above window is shown when performing a Boolean search. The Search Results List shows the Call Number, Title, Author, Media and Availability for all titles that match your search. The window shows the results of your search in the order which items are located. Click the column headers to sort the list.

Use the up and down arrows on the keyboard or click on items to select them. To remove lines from the list, highlight them and select **Cut** from the **Edit** menu or press <delete> on the keyboard. To select several sequential items, hold down <shift> while you click to select items, or select the first and last item you want. To select multiple non-sequential items, hold down the <ctrl>|<command> while you click to select items.

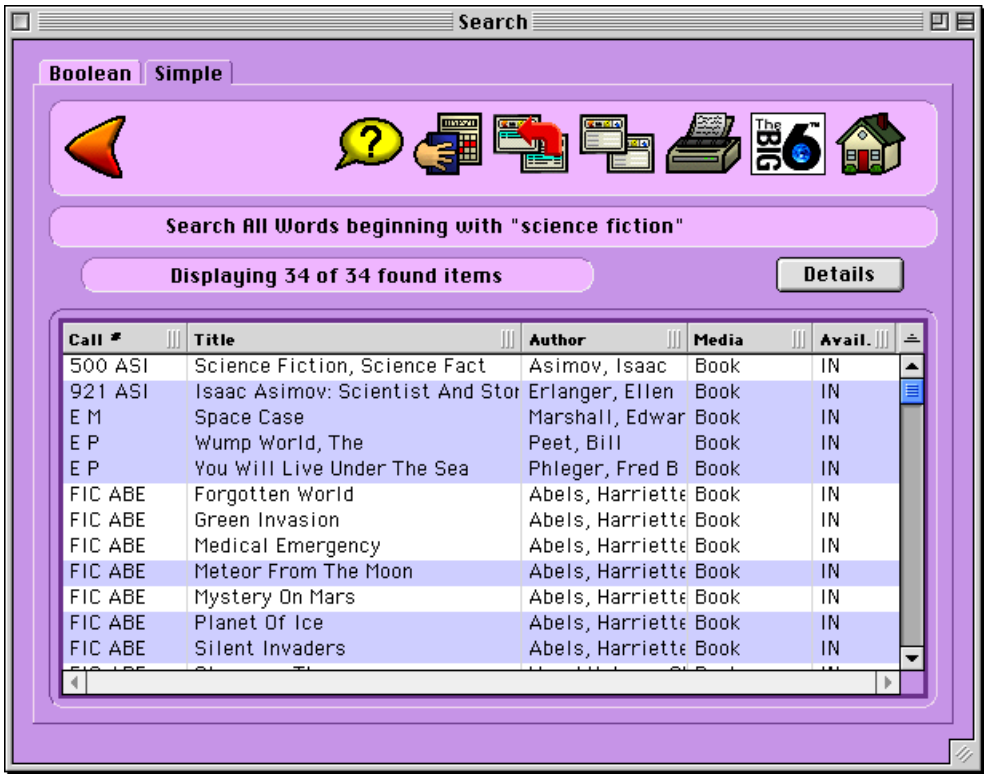
To print the contents of the **Results List** or Saved List, chose **Print** from the **File** menu or click on the **Print** icon.

If you are using **Alexandria Librarian**, hold down <alt|option> or the <ctrl>|<command> and double-click an item in the list to quickly go to the **Items** window with that title record. The **Items** window opens with the item you selected.

If you are using **Alexandria Librarian**, an asterisk symbol ("*") appears at the end of the row when the item is marked as **Don't Show in Alexandria Researcher.**

Creating your own Custom Results Lists

To create a list of items from the Results List, select the items in the list you want to save and click the **Save List** icon. In the example below, the gray-highlighted items were saved from the Results List.



When you click the **Save List** icon with items selected, a new **Save List** window appears with the items you have selected to save.

You can move items from list to list by selecting them and using standard editing functions (i.e. drag and drop, **Cut**, **Copy**, and **Paste**). You can also copy lists into a word processing document. Use `<ctrl>`|`<command>`-click to select non-adjacent items and `<shift>`-click to select groups. Use `<delete>` or the **Edit** menu **Clear** command to remove items. You can also use the **Cut**/**Copy**/**Paste** commands under the **Edit** menu to move items from list to list, or from list to a word processor. You may also drag and drop items or item groups between lists.

Simple Search Results List

Depending on your Preferences, you may get the following results window:

To view more results, click on the up or down arrows.

To sort the list, click on the word "**Title**," "**Author**," or "**Call#**" in the **Sort Results By** area. The current sort order is shown in **bold**.

To view details for one of the items, click on it once. The simple details window will be shown *((see "Viewing Item Details from a Simple Search Results List" on page 220))*.

Placing Holds and Making Reservations

Patrons can place holds or make reservations on items from Research Workstations if you've set the **Allow Holds and Reservations** preference *((see "Alexandria Researcher Preferences" on page 69))*. Holds and reservations can be placed from the Results List, or the Details window.

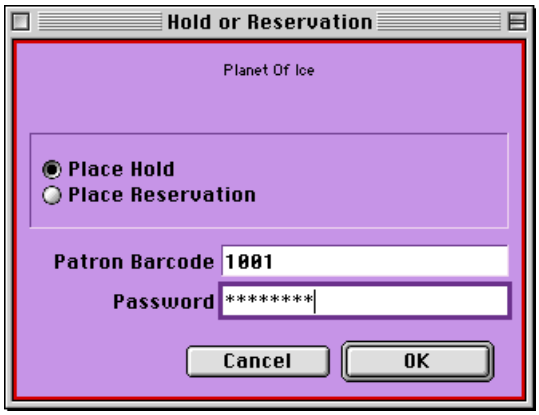
Use the **Hold or Reservation** icon to place a hold or reservation. If you highlight more than one item, Alexandria only processes the first selected item. On the Details window there is also a **Place Hold** and/or **Place Reservation** link at the bottom.

- Hold requests are placed on titles rather than individual copies. A patron who places a hold on an item is alerted when a copy of the title becomes available. If an item is currently available, an In-Stock hold is placed. Otherwise, a standard hold request is placed.
- Reservations are placed on individual copies. The patron must find a copy that is available on the days the patron wants to reserve the item.

To place a Hold, do the following:

Step 1. Select the **Hold** icon from the Results List, or **Place Hold** on a Details window.

Step 2. Enter your Patron Barcode and **Password**, then the **Place Hold** button.



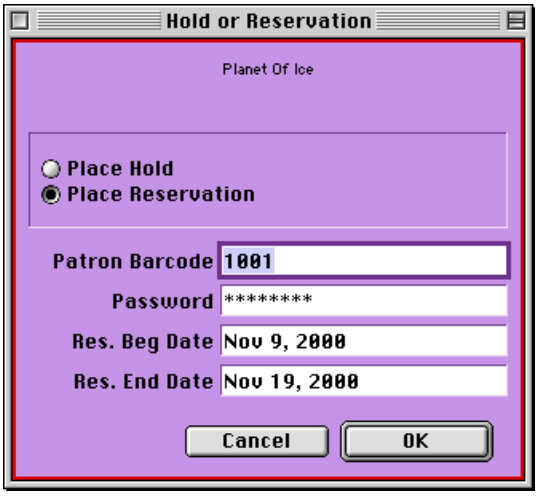
Your password must match your master record, or access will be denied. The default password is the patron's last name. Patron's can change their password using the **Change Password** window in Alexandria Researcher. No spaces or punctuation is allowed in the password. Therefore, if a last name is hyphenated, enter the name as one long word.

Step 3. If you choose **OK** your hold is placed and a confirmation document is shown. You may print or save it just like any other Alexandria document by selecting **Print** from the **File** menu. To cancel, close the window using the close box or click the **Cancel** button.

To place a Reservation, do the following:

Step 1. Select the **Reservation** icon from the Results List, or **Place Reservation** link on a Details window.

Step 2. If you choose **Place Reservation**, the Reservations window appears.



Enter your Patron Barcode and **Password**, then the **Place Hold** button.

Your password must match your master record, or access will be denied. The default password is the patron's last name. Patron's can change their password using the **Change Password** window in Alexandria Researcher. No spaces or punctuation is allowed in the password. Therefore, if a last name is hyphenated, enter the name as one long word.

Step 3. Select the days you want to reserve the book and click **OK**. Alexandria attempts to locate a copy which will be available during that time period. If no copy is available, a further selection window will appear.

Once a reservations has been placed, a confirmation document appears, you may print or save it just like any other Alexandria document by selecting **Print** from the **File** menu.

Displaying Patron Details

Patrons can view the status of items they have checked out, Holds and Reservations they have placed, and other status information from **Alexandria Researcher**. Patrons can only check their own status, not that of other patrons. This is also where Patrons can change their password by using the **Change Password** button. You must enter the new password twice to confirm the change. Passwords are never shown on the screen, all you will see are filler characters.

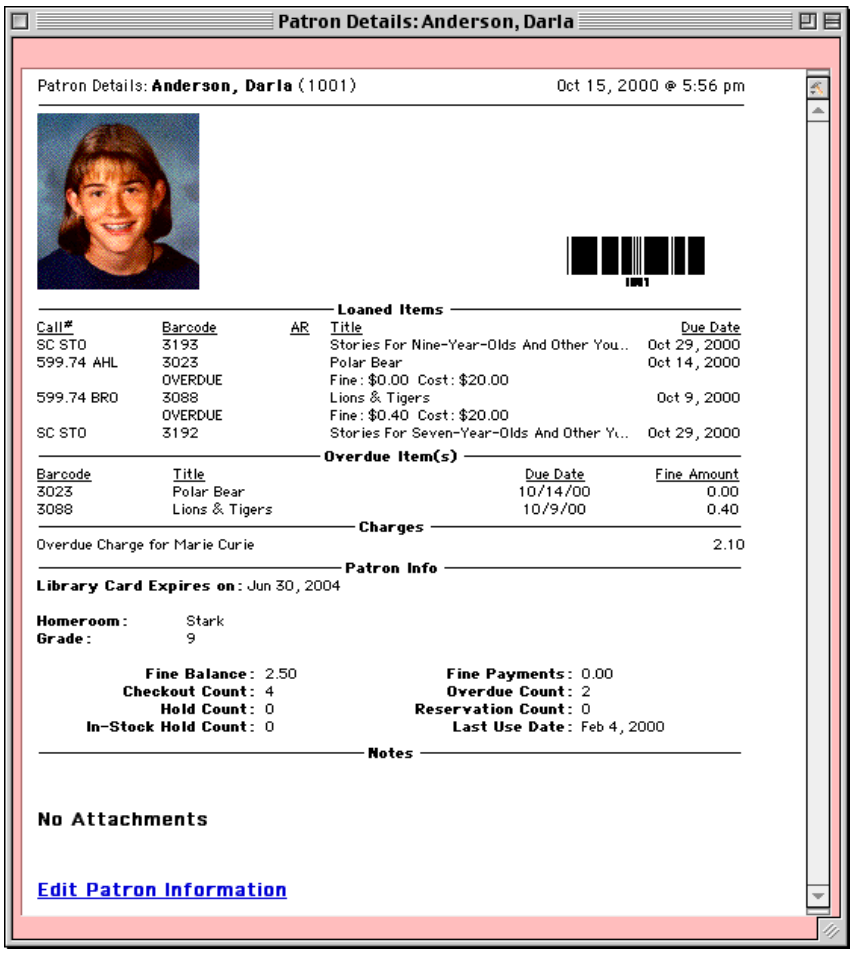
Patrons use the following steps to check their status:

Step 1. Select **Patron Details** from the **Show** menu.

Step 2. Enter your **Patron Barcode** and **Password**, then click **Get Status**. Your password must match your master record, or access will be denied.

Use the **Change Password** button to change your password. You must enter the new password twice to confirm the change. Passwords are never shown on the screen, all you will see are filler characters.

Step 3. A **Patron Details** window appears with patron information. The user may print or save it just like any other Alexandria document.


Patron Details: Anderson, Darla
Patron Details: Anderson, Darla (1001)
Oct 15, 2000 @ 5:56 pm
Loaned Items
Call# Barcode AR Title Due Date
SC STO 3193 Stories For Nine-Year-Olds And Other You.. Oct 29, 2000
599.74 AHL 3023 Polar Bear Oct 14, 2000
OVERDUE Fine: $0.00 Cost: $20.00
599.74 BRO 3088 Lions & Tigers Oct 9, 2000
OVERDUE Fine: $0.40 Cost: $20.00
SC STO 3192 Stories For Seven-Year-Olds And Other Y.. Oct 29, 2000
Overdue Item(s)
Barcode Title Due Date Fine Amount
3023 Polar Bear 10/14/00 0.00
3088 Lions & Tigers 10/9/00 0.40
Charges
Overdue Charge for Marie Curie 2.10
Patron Info
Library Card Expires on: Jun 30, 2004
Homeroom: Stark
Grade: 9
Fine Balance: 2.50
Checkout Count: 4
Hold Count: 0
In-Stock Hold Count: 0
Fine Payments: 0.00
Overdue Count: 2
Reservation Count: 0
Last Use Date: Feb 4, 2000
Notes
No Attachments
Edit Patron Information

Viewing Item Details from a Standard Search Results List

To view complete, detailed information for an item in the results list, highlight the item and double-click the line or select the line and click the **Details** button.

If you use the Duplicate icon with the **Details** display, the data is copied into a standard word processing window. You can print it, save it, or copy information into any other word processing window using standard editing functions from the **Edit** menu.

To launch an attachment for this item, click on the **Details** window.

Search
Boolean
Simple
Displaying Title
4 of 34
Call Number: FIC ABE
Authors: Abels, Harriette Sheffer
Furan, Rod"
Title: Forgotten World
Publisher: Crestwood House: Mankato, Minn, 1979
Medium: Book
Subjects: Science Fiction
Summary: A malfunctioning engine forces the EM 88 to land on an uncharted asteroid which bears a strange resemblance to Earth.
Citation: Abels, Harriette Sheffer, and Rod" Furan. Forgotten World. Mankato, Minn: Crestwood House, 1979.
LCCN: 79004633
ISBN: 79004633
Vol Call# Barcode Status Collection
FIC ABE 3002 Available CDL
No Attachments
Search All Words beginning with "science fiction"

- NOTE -

On a Macintosh, you must have `INTERNET.CONFIG` installed to launch a URL attachment. This is part of the standard Mac OS. **QuickTime** is required to launch multimedia.

To see an attachment, click its name.

You can set a preference to determine how much detail appears on the **Details** window (*(see "Alexandria Researcher Preferences" on page 69)*).

If your preferences allow viewing of the Marc record, a **View Marc Record** link is shown. In the same way, if **Holds** or **Reservations** are allowed, links are shown at the bottom of the Detail Information.

Viewing Item Details from a Simple Search Results List

To view information for an item in the Simple Results List, single-click the line of the item you want to view. The Simple Details window is a simplified version of the Standard Details window.

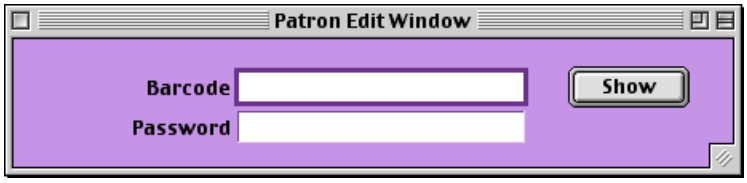
Use the arrows at the bottom of the window to view details for each Title in the Simple Results List.

Changing Patron Information

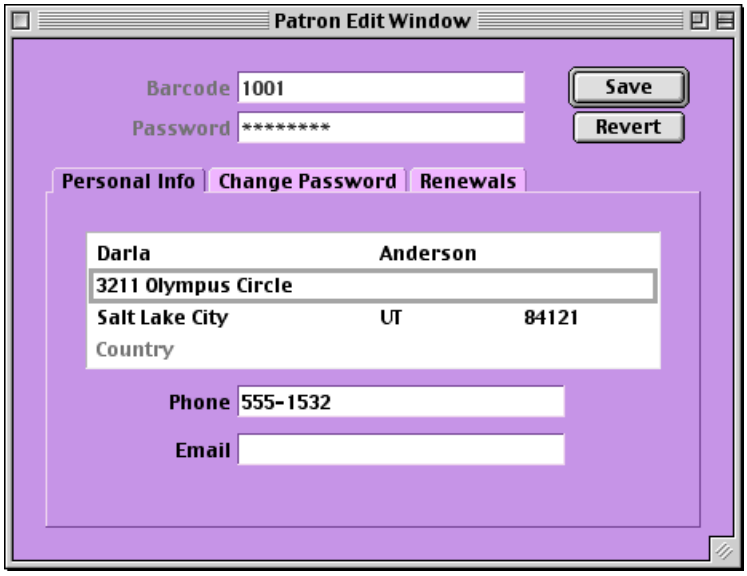
Although librarians can quickly change patron information using the Patron Management window *(see "Patron Management" starting on page 107)*, it's often necessary for the patrons to manage changes in their own records. This interface also provides librarians with an easy way to change some patron information. Depending upon the preference settings *(see"Alexandria Researcher Preferences" on page 69)*, the user may be restricted from making some changes.

There are two primary ways to activate this interface. The fastest way is to click the "**Edit Patron Information**" hyper-link at the bottom of the Patron Details window. Another way is to select **Simple Patron Edit** from the **Show** menu.

First, identify yourself. If you haven't already, you'll need to enter the Patron **Barcode** and **Password**.

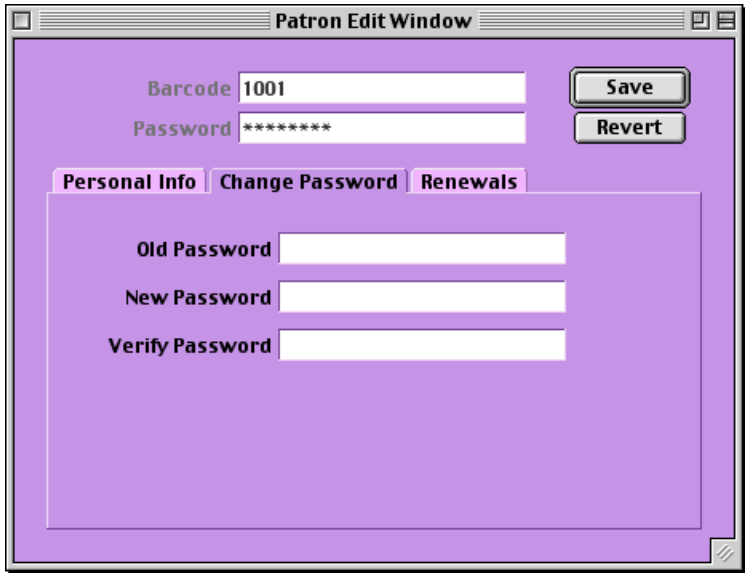


Once you've identified yourself as someone authorized to change a patron's data, you'll see the Patron Edit window.



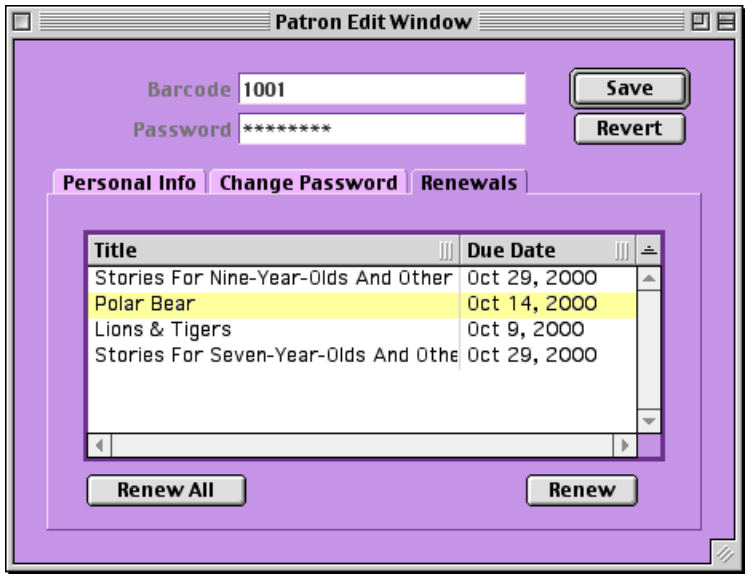
This window allows you to change certain Personal Information.

Click the **Change Password** tab to change the Patron's password.



To change the password, enter the **Old Password** once, and the new password twice. If the **Old Password** you enter matches the current password, and if both **New Password**s were identical, the password will be updated. If the information isn't entered correctly, Alexandria will not change the password.

This interface also allows the user to renew some (or all) of their items. Click the **Renewals** tab.



To renew an item, click on an item, then click the **Renew** button. To renew all items, click on the **Renew All** button. If a renewal is allowed, the new **Due Date** appears in the list. If the renewal was not allowed, Alexandria will pop up a window explaining why the renewal failed. Renewals are rejected if the Patron has reached their renewal limit, if there is a hold pending for the title, or if a Reservation is pending for that specific copy.

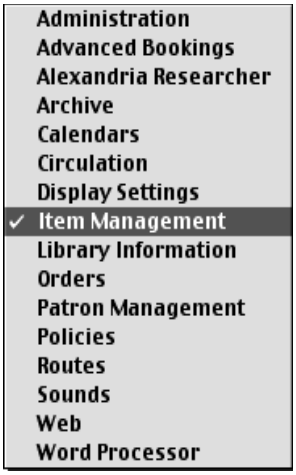
Alexandria WEB

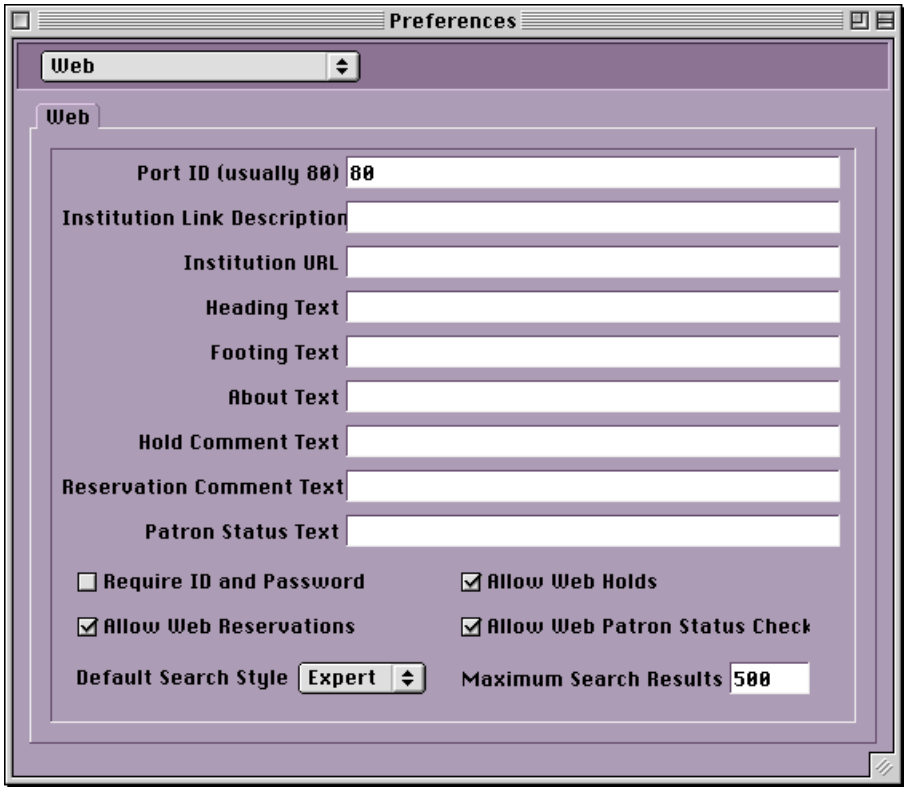
This chapter demonstrates how to search Alexandria media collections using the Alexandria WEB interface.

> **- NOTE -**
>
> Alexandria WEB is an optional feature of Alexandria. You must purchase a separate license to use this feature.

Web Preferences

If you have licensed Alexandria WEB, these preferences are available to customize the interface for your library.





Port ID—Sets the port number used for Web interface (default is 80).

Institution Link Description—A description (and only visible text) shown on the web page for a link to the institution's home page.

Institution URL—The actual URL for the institution's home page (e.g. "`http://www.goalexandria.com`").

Heading Text—Allows you to customize the text shown at the top of the web page.

Footing Text—Allows you to customize the text shown at the bottom of the web page.

About Text—Allows you to customize the text shown at the bottom of the **Web About** window.

Hold Comment Text—Allows you to customize the text shown for patron holds. Can contain library rules or other short note.

Reservation Comment Text—Allows you to customize the text shown for patron reservations.

Patron Status Text—Allows you to customize the text shown for checking patron status.

Require ID and Password—If **ON**, web access requires patron ID (barcode) and password. When off, any Internet user has the ability to peruse the catalog collection. The Default is **OFF**.

Allow Web Holds—When **OFF**, hold requests via the web are disabled. Hold requests require a patron ID (barcode) and password. The Default is **ON**.

Allow Web Reservations—When **OFF**, reservation requests over the web are disabled. Reservation requests require a patron ID (barcode) and password. Default is **ON**.

Allow Web Patron Status Checks—When **OFF**, patron status requests over the web are disabled. Patron status requests require a patron ID (barcode) and password. Default is **ON**.

Default Search Style—Use this pull-down menu to select the default search interface for Alexandria WEB queries. Default is **Simple**.

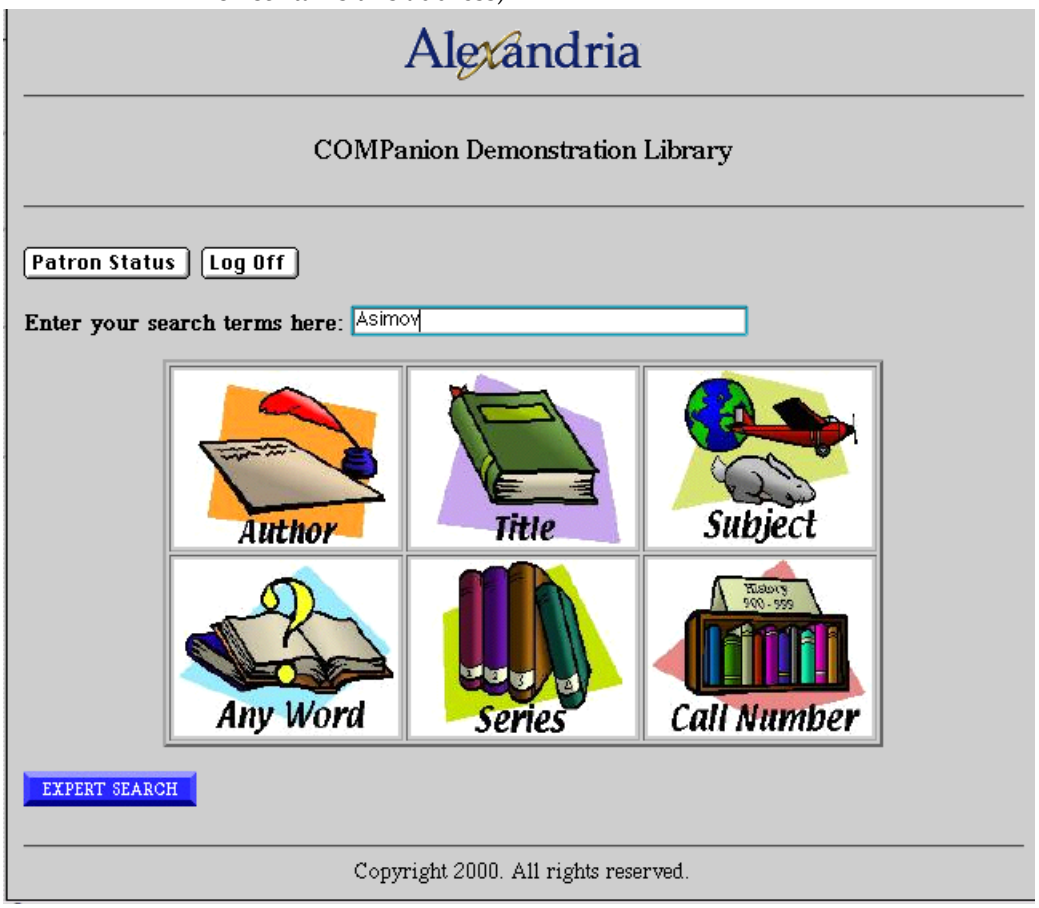
Maximum Search Results—This preference allows you to set the maximum number of items returned during a Alexandria WEB search query. Valid ranges are from 50 to 500. The default is "500".

Searching with Alexandria WEB

With Alexandria WEB you can perform several Researcher functions using a standard World Wide Web browser such as Netscape Navigator or Microsoft Internet Explorer.

Use the following instructions to search for items in your Alexandria collection using Alexandria WEB.

Step 1. To connect to the Alexandria WEB-search interface, enter the IP address of the machine running the Alexandria Data Station (or click on a link which contains this address).



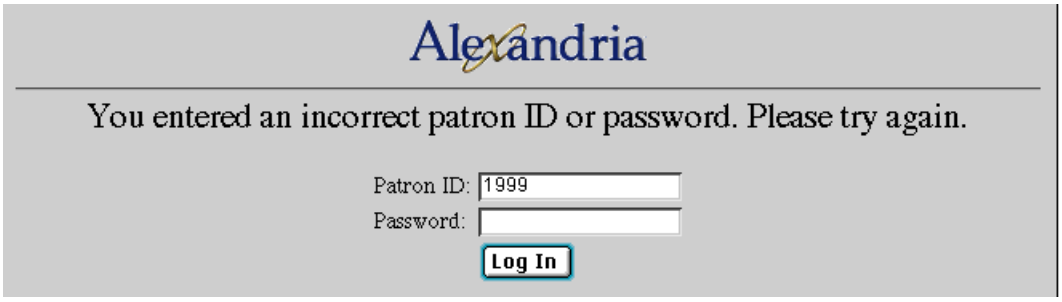
Step 2. Follow the instructions on the Web page. Searching with Alexandria WEB is similar to searching with the Alexandria Researcher.

Alexandria WEB supports a Simple Search, a Boolean Search, Results, and Details (just like Alexandria Researcher). You can even place Holds, Reservations, and display patron Details. You can also change the Alexandria WEB interface to display in a different language.

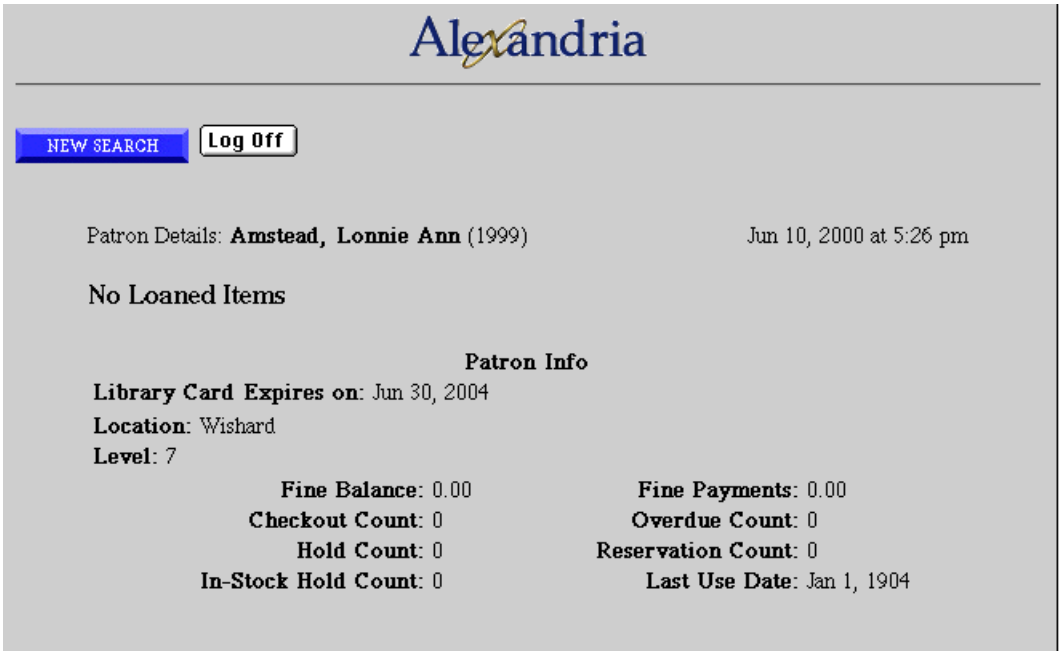
Alexandria WEB sample windows

Here are some sample windows from the Alexandria WEB interface.

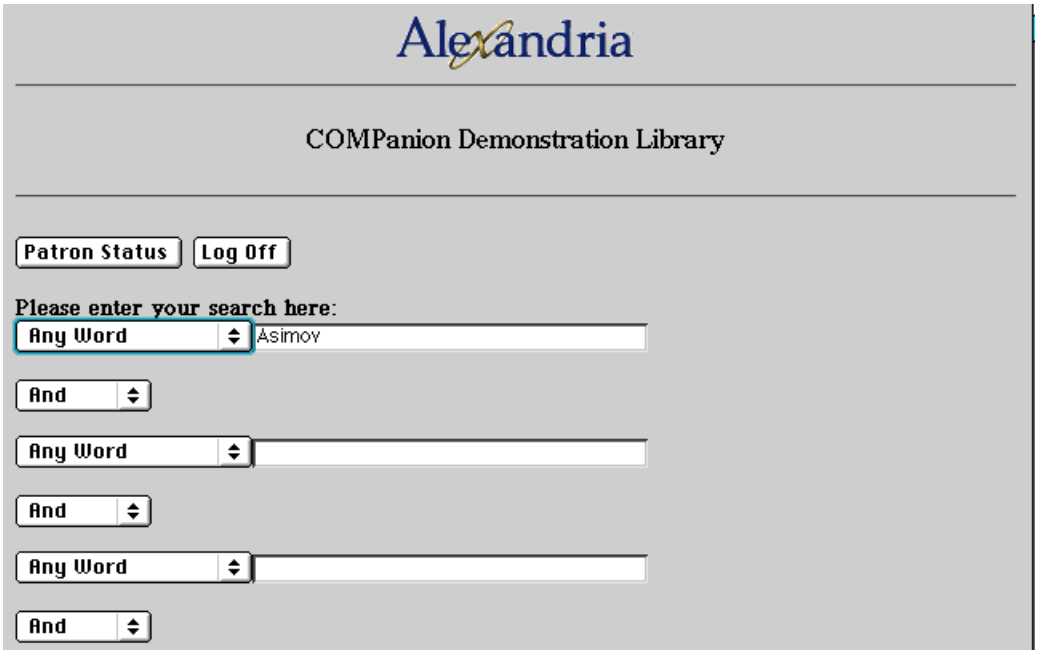
Alexandria WEB, Patron Log In



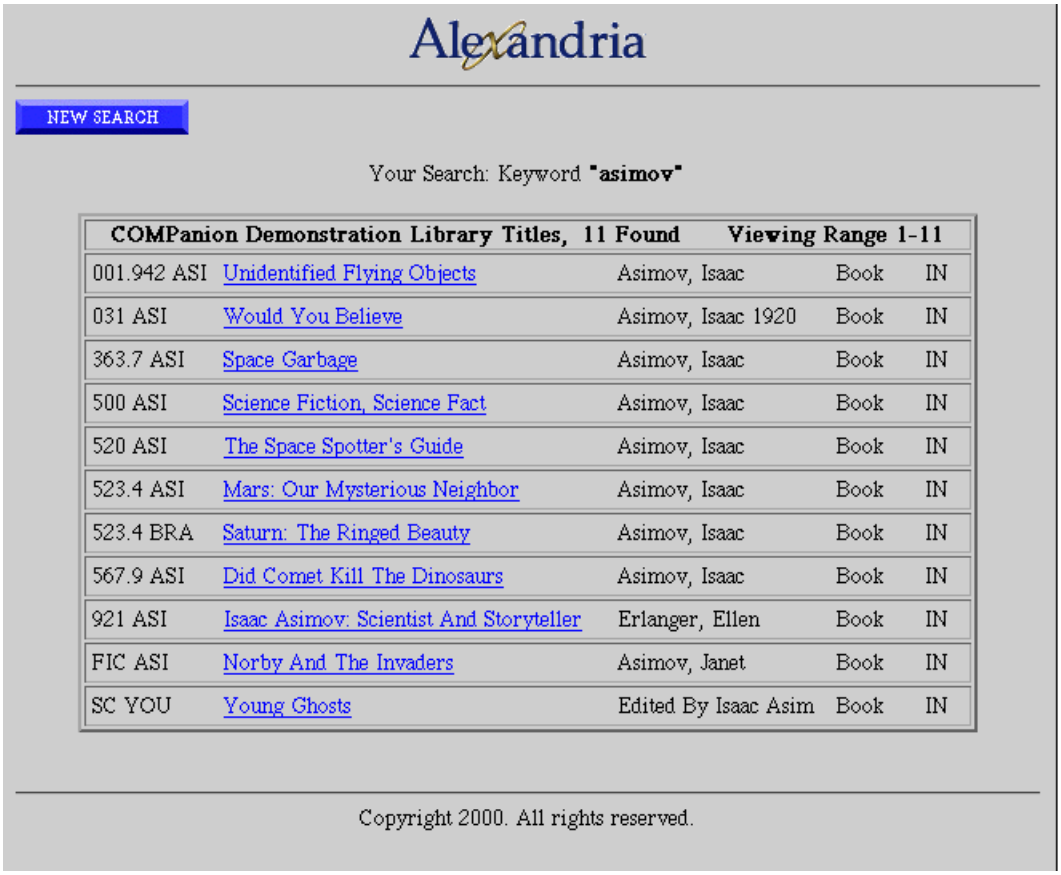
Alexandria WEB Patron Details



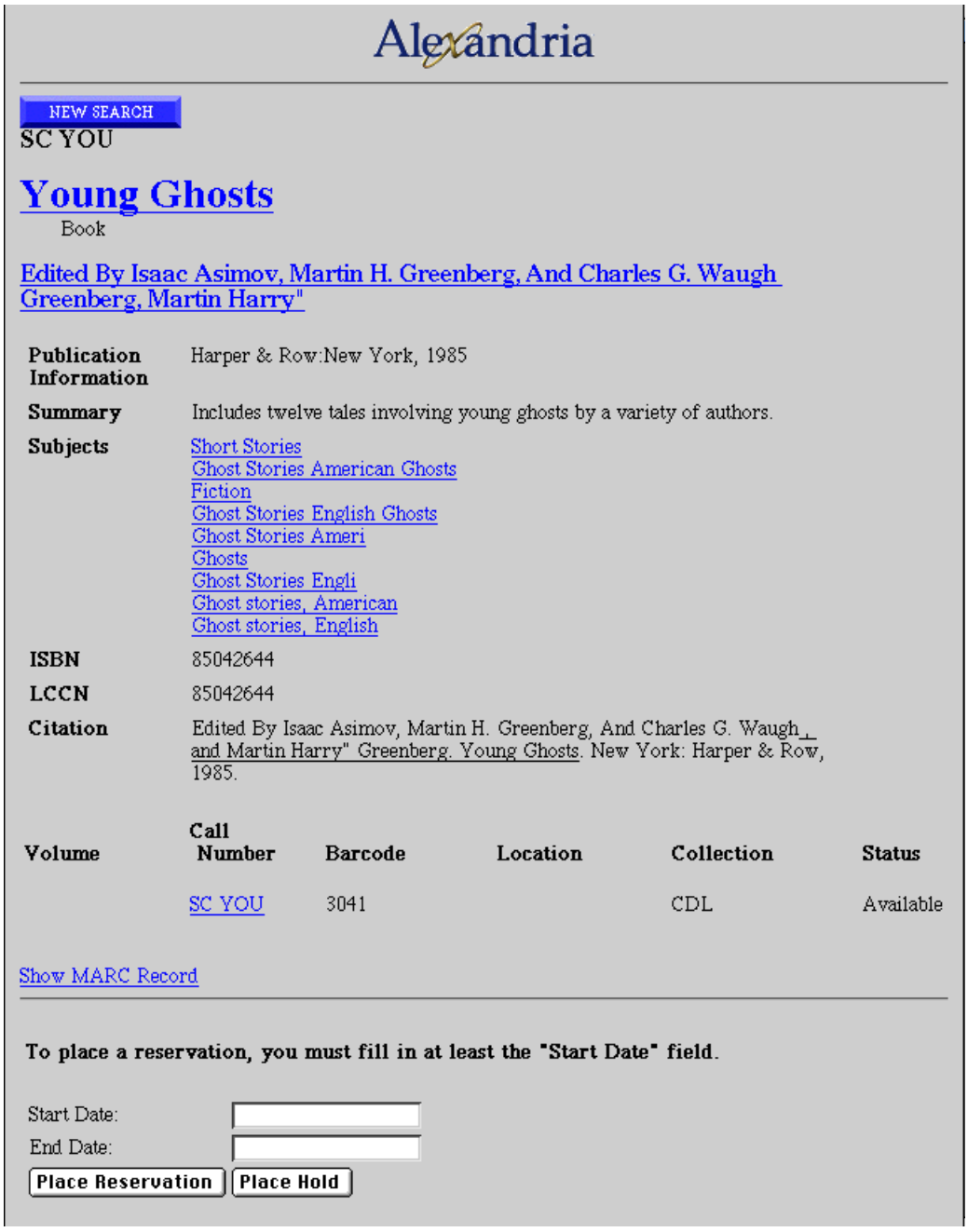
Alexandria WEB Boolean Search.



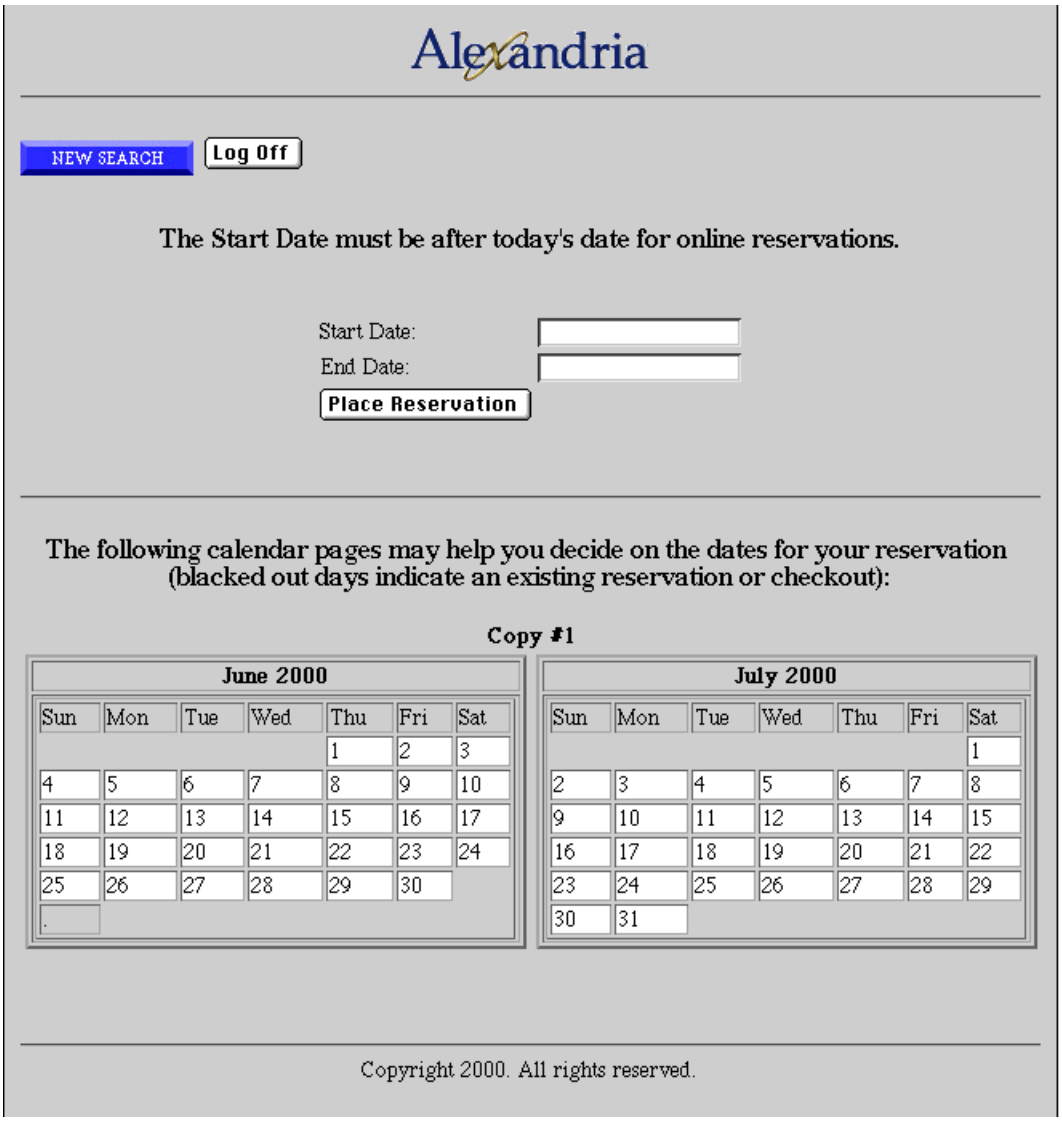
Alexandria WEB Results


Alexandria
NEW SEARCH
Your Search: Keyword "asimov"
COMPanion Demonstration Library Titles, 11 Found Viewing Range 1-11
001.942 ASI Unidentified Flying Objects Asimov, Isaac Book IN
031 ASI Would You Believe Asimov, Isaac 1920 Book IN
363.7 ASI Space Garbage Asimov, Isaac Book IN
500 ASI Science Fiction, Science Fact Asimov, Isaac Book IN
520 ASI The Space Spotter's Guide Asimov, Isaac Book IN
523.4 ASI Mars: Our Mysterious Neighbor Asimov, Isaac Book IN
523.4 BRA Saturn: The Ringed Beauty Asimov, Isaac Book IN
567.9 ASI Did Comet Kill The Dinosaurs Asimov, Isaac Book IN
921 ASI Isaac Asimov: Scientist And Storyteller Erlanger, Ellen Book IN
FIC ASI Norby And The Invaders Asimov, Janet Book IN
SC YOU Young Ghosts Edited By Isaac Asim Book IN
Copyright 2000. All rights reserved.

Alexandria WEB Title Details



Alexandria WEB Reservations

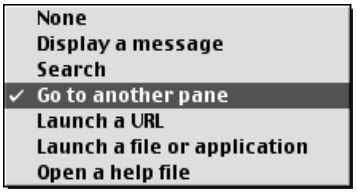

Alexandria
NEW SEARCH
Log Off
The Start Date must be after today's date for online reservations.
Start Date:
End Date:
Place Reservation
The following calendar pages may help you decide on the dates for your reservation (blacked out days indicate an existing reservation or checkout):
Copy #1
June 2000
Sun Mon Tue Wed Thu Fri Sat
1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30
July 2000
Sun Mon Tue Wed Thu Fri Sat
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31
Copyright 2000. All rights reserved.

Alexandria Explore

This chapter explains how to configure and search Alexandria collections using the Alexandria Explore interface.

> **- NOTE -**
>
> Alexandria Explore is an optional feature of Alexandria. You must purchase a separate license to use this feature.

Alexandria Explore provides an attractive iconic interface through which patrons can search the local collection and perform other activities.



The librarian configures the iconic interface. Each button can be arranged with an attractive icon and short text label below it. Alexandria Explore supports multiple languages, so the text labels shown below the icons will dynamically change depending upon your language settings.

Each icon/button can be configured to do one of the following actions.

- **Display a message—**Clicking on a button will display a message. Use this capability to configure simple messages for library patrons.
- **Perform a search—**The search is configured using the standard Alexandria Boolean search interface, so any search supported by Alexandria can be performed by clicking on an icon.
- **Go to another pane—**Display another pane. This allows the librarian to configure a powerful iconic interface tree.
- **Launch a URL—**Perhaps you have cataloged a number of useful web sites for your patrons. These sites can be configured into Explore so that clicking on an icon will take the user to that site.
- **Launch a file or application—**Any files that you can double-click on in your standard operating system interface can be launched when you click on an Alexandria Explore icon. Use this capability to show pictures, play movies, play soundtracks, open utility programs, mount file servers, or anything else your imagination can come up with.
- **Open an Alexandria help file—**Provide an additional help directly from within Alexandria Explore. Any Alexandria help file can be opened.

> **- TIP -**
>
> The Alexandria Explore interface allows users to import and export Alexandria Explore panes. Thus, you can share your own creations with other librarians in your district, or around the world.

Alexandria Explore Preferences

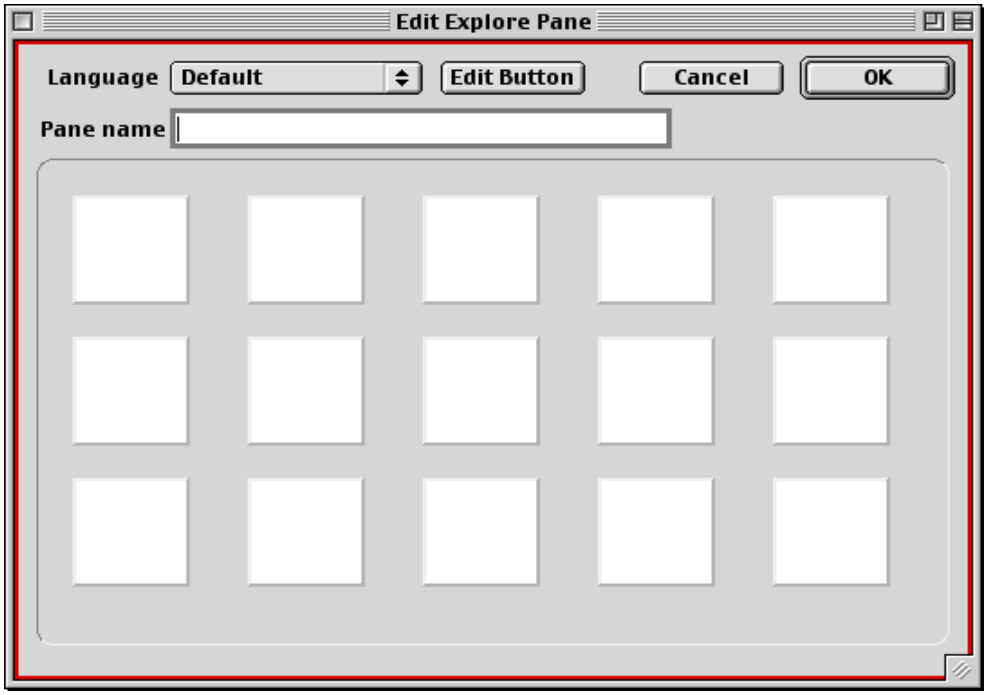
If you've purchased the Alexandria Explore option, a new **Explore** tab will appear on the **Alexandria Researcher Preference** window. This tab allows you to fully configure the **Explore** interface.

The Alexandria Explore interface consists of a number of panes which contain a number of icons/buttons. Each icon has a text label and an action associated with it. The text label is shown below the icon, and the action is performed when the icon is clicked by Alexandria Explore patrons.

When you license Alexandria Explore, you receive a fully configured sample iconic interface with sample icons you can use to create your very own interface. To create an interface for your library, you can:

- Remove the sample panes and start with a clean slate. Build the entire interface from scratch by yourself.
- Use the sample interface as a starting point, and then customize it to meet your library's specific needs.
- Import a ready-made Explore interface created by someone else.
- Import panes created by you or someone else and use them to quickly configure your own custom interface.
- Do any combination of the above.

Add Pane—Create a new pane by clicking on the **Add pane** button. Enter a name for the new pane (this is required). The name can be changed later, so call it anything. If you are configuring your interface for multiple languages, you'll need to provide a **Pane name** for each **Language** you want to support. If you don't specify a name for the other language, the name you've entered in your default language (the one you are using now) will be used.



Remove Pane—This button removes the selected pane.

> **- NOTE -**
>
> There is **no Undo** for recovering deleted panes! However, you can use the Export button to save panes for backup purposes.

Edit Pane—If you have an existing pane, you can edit it by double-clicking on the pane name or selecting the **Edit pane** button.

Click on a Button to select it. To edit the Button, double-click on it, or click the **Edit Button**. You can drag a Button to another location. If that location is blank, the icon will take its place. If there's another Button at the destination location, the Buttons will trade places. If you hold the <option> key down during the drag, the Button will be copied.

You can also modify Buttons using contextual menus. For Macintosh, hold the <ctrl> key down and click a mouse button. For Windows, use the right mouse button. Contextual menus (as shown to the left) let you perform all iconic-Button commands.

- NOTE -

An icon is the picture shown on a Button. You can **Cut**, **Copy** and **Paste** icons. A Button consists of a Button Icon, a Button Name and a Button Action. When you copy or move a Button, all these attributes move along with them.

For convenience, you can drag, drop, or paste icon images directly onto buttons.

- HINT -

When viewing the panes, place the cursor over a button and wait for the tool tip to come up. The tool tip will display which action will be performed when that button is clicked by library patrons. To force the tool tip to appear, use the <option> key for Macintosh or the <ctrl> key for Windows.

To configure the pane for another language, select the language in the **Language** pull-down menu.

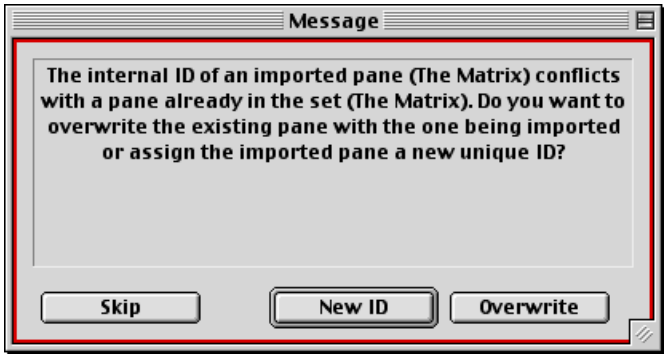
- NOTE -

When you switch languages you can customize the **Pane name**, the text label below a Button, and the message for the **Display Message** action. If you don't provide text for the new language, the default language text will be used..

Other actions (as shown below) do *not* change for each language.

Set Default Pane—When you click on this button, the currently selected pane will become the default pane. The default pane is always shown in bold. The default pane is the first pane shown when a user looks at the Explore interface in Alexandria Researcher.

Import Pane—Click this button to import an exported pane. A pane can also be imported by dragging and dropping it on the pane list. Each pane has an unique internal ID that Alexandria identifies. If you are importing a pane with an ID that already exists, you'll get this message:


Message
The internal ID of an imported pane (The Matrix) conflicts with a pane already in the set (The Matrix). Do you want to overwrite the existing pane with the one being imported or assign the imported pane a new unique ID?
Skip
New ID
Overwrite

If you **Skip** the pane, it won't be imported. If you select **New ID**, the pane will be imported and assigned a new ID. If you select **Overwrite**, the imported pane will replace the existing pane with the same ID.

- NOTE -

Alexandria Explore uses the internal ID to link panes to one another. If you change a panes ID, existing panes which are designed to link to it won't be able to. If you are building a new interface from pieces supplied by others, it's worth checking each icon/button to verify it's correctly configured.

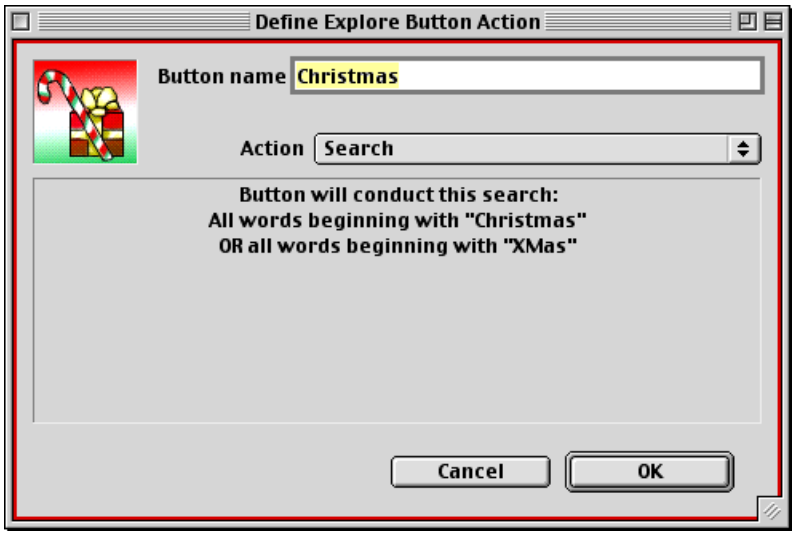
However, if you overwrite a pane during import, all imported panes which are linked to the old ID are automatically updated.

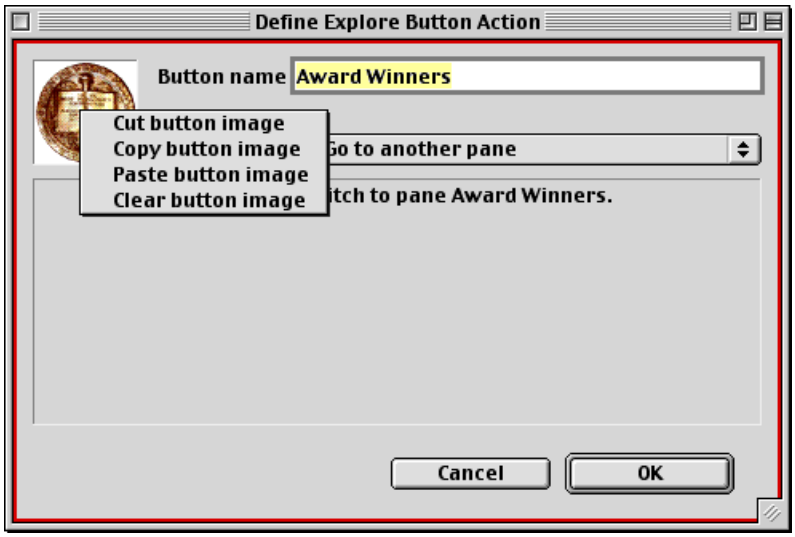
Export Pane—Click this button to export the currently selected pane.

Export All Panes—Click this button to export all the panes in this system. The entire set of panes can be imported using the **Import Pane** button, or by dragging the file to the list of panes. This command can be useful when configuring the Alexandria Explore interface for a large number of users. Configure the interface in one central location and share it with others by exporting the panes and then sending the export file to those who want to use your interface.

Placing and configuring button/icons

Each pane can hold a fixed number of button/icons in a grid pattern. An empty button is shown for each unused position on the grid. To edit the button, double-click it or select it and click **Edit Button**.

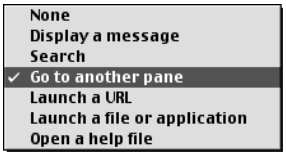




A button definition window appears. Paste or drag an icon into the icon holder position at the top left of the window. If you enter text for the **Button name**, it's shown below the icon in the pane.

You can add an icon by selecting the icon box and **Paste** in the **Edit** menu (if you have a picture on the clipboard), by using the icon contextual menu, or dragging and dropping a picture file onto the icon position.

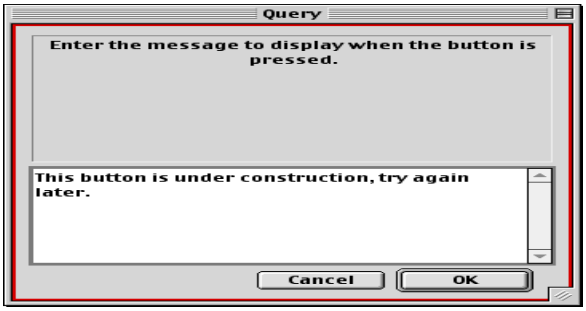
When this button is clicked by your patrons, Alexandria Explore will perform the Action you've configured in the **Action** pull-down menu.



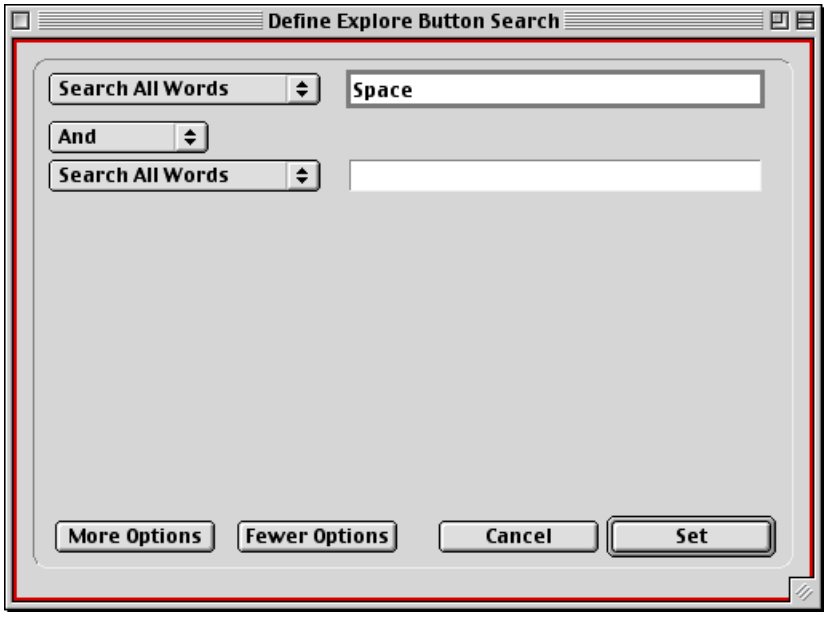
Button Actions

None—No action is performed. The button does nothing.

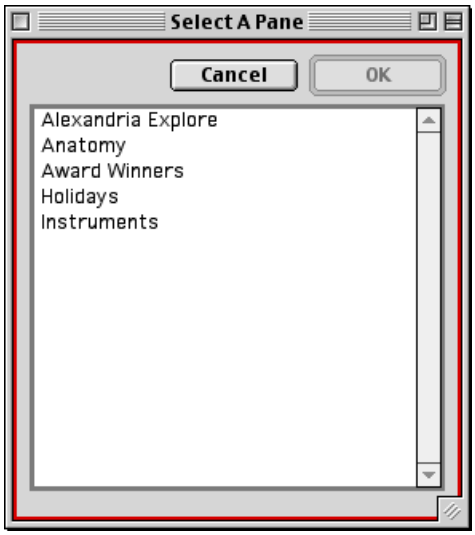
Display a message—The button will display a message. Enter the message you want displayed when this button is clicked.


Query
Enter the message to display when the button is pressed.
This button is under construction, try again later.
Cancel
OK

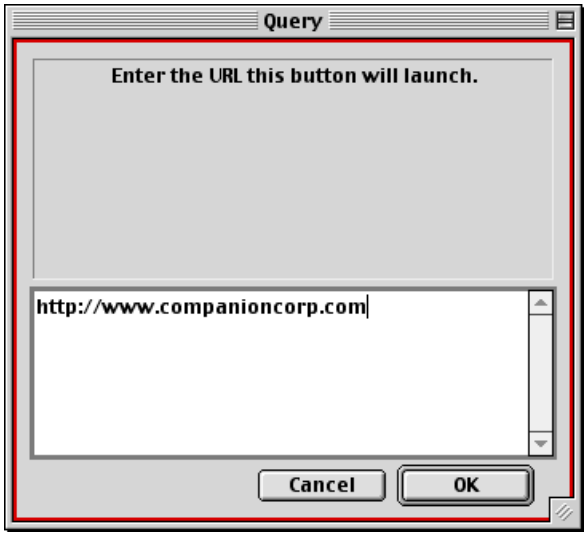
Search—The button will perform an Alexandria search. Enter the search criteria.



Go to another pane—The button will cause Alexandria to display another Alexandria Explore pane window.



Launch a URL—The button will launch a specified URL in your system's default internet browser.



Launch a file or application—The button will launch any specified file or application. Alexandria will bring up a standard open window to select the file or application you want launched.

Open a help document—The button will open an Alexandria help document if you select one from a list of currently installed help documents.

Searching with Alexandria Explore

If you've purchased the Alexandria Explore option, your search window will contain a new **Explore** tab. Click on this tab to view the default **Explore** pane.

To search using the Alexandria Explore interface, click on an icon. Some pictures will take you to new panes; others will perform an Alexandria search. Some will launch a URL in your systems default web browser, and others will open files on the local hard disk. The entire interface can be customized to meet the needs of your library.

When the user is exploring panes beyond the default pane, they can navigate by using the back button or return to the default pane window by clicking on the Home icon.

WAN Searching

This chapter demonstrates how to search Alexandria collections using Alexandria WAN (Wide-area Network) access.

> **- NOTE -**
>
> Alexandria WAN access is an optional feature of Alexandria. You must purchase a separate license to use this feature. If you have not purchased this option, WAN capabilities will not be active in your system.

Configuring your system for WAN access

With the WAN (wide-area network) feature of Alexandria, you can access different data collections residing on COMPanion Data Stations connected through a Wide-Area Network.

The following are general steps required to gain access to COMPanion Data Stations. For more detailed instructions, (see "Installing Alexandria Clients" on page 27)

Step 1. Define address books that contain a list of addresses for machines running a COMPanion data station to which you want access *(see "Address Books" on page 63)*.

Step 2. Create groups of Data Stations as needed.

Step 3. Set the Research Workstation preference by selecting one of the address books you have defined *(see "Alexandria Researcher Preferences" on page 69)*.

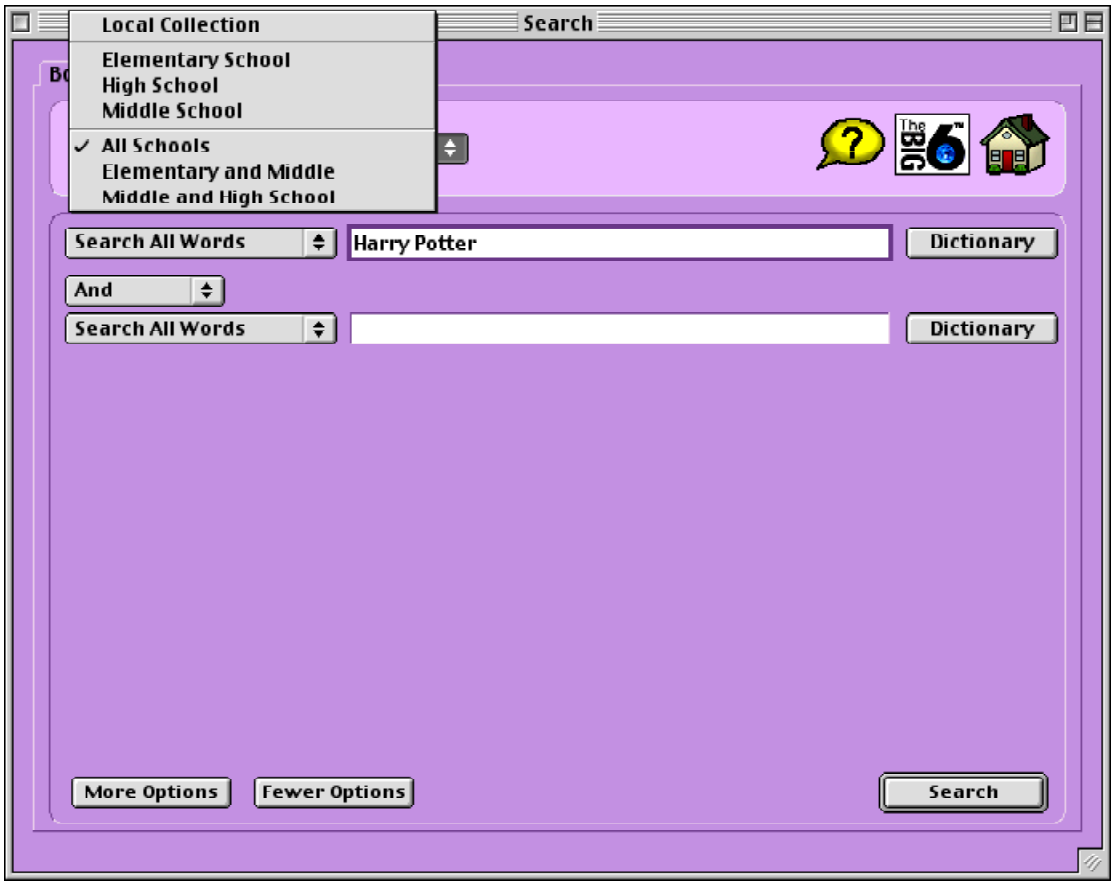
Step 4. Choose a data station on the **Researcher Workstation** or **Search** window *(see "Boolean Search" on page 206)*.

Step 5. Perform your search as described in the next section.

Wan Searching

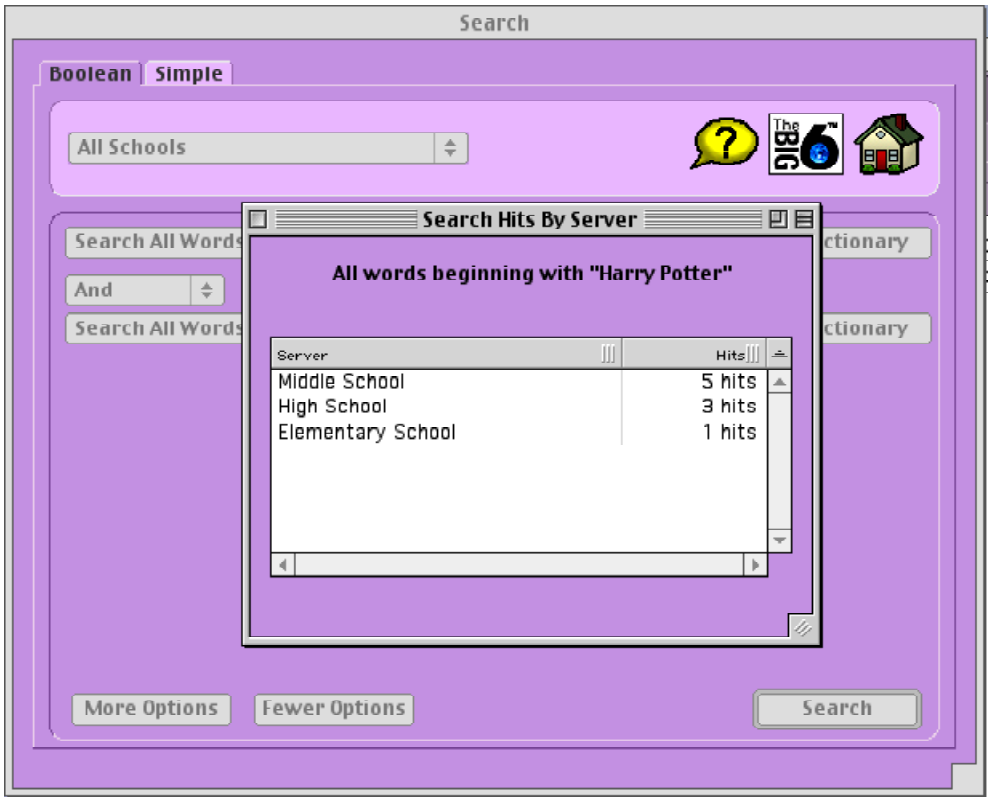
To perform WAN searching do the following.

Step 1. Select a particular collection or collection-group to search from in the pull-down menu on top of the Boolean search window.



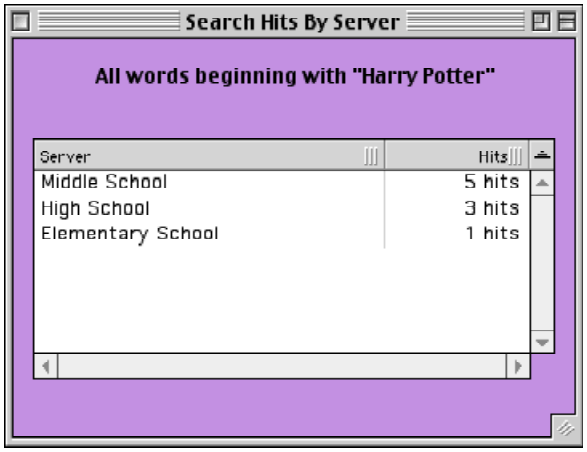
In the example above, the first group of entries refer to individual collections in the Elementary, High and Middle school. If you select one of these Data Stations, the results will look exactly as they do when searching the **Local Collection**.

Step 2. If you've selected a group search, an intermediate results window is displayed.



Step 3. To view the search results for one of the collections in the list, double-click on the collection. A standard Alexandria result window is displayed.

Step 4. To examine results from other collections, click on another collection name.



Z39.50 Client

This chapter explains how to search Alexandria collections using the Alexandria Z39.50 Server interface.

> **- NOTE -**
>
> The Z39.50 Server is an optional feature of Alexandria. You must purchase a separate license to use this feature.

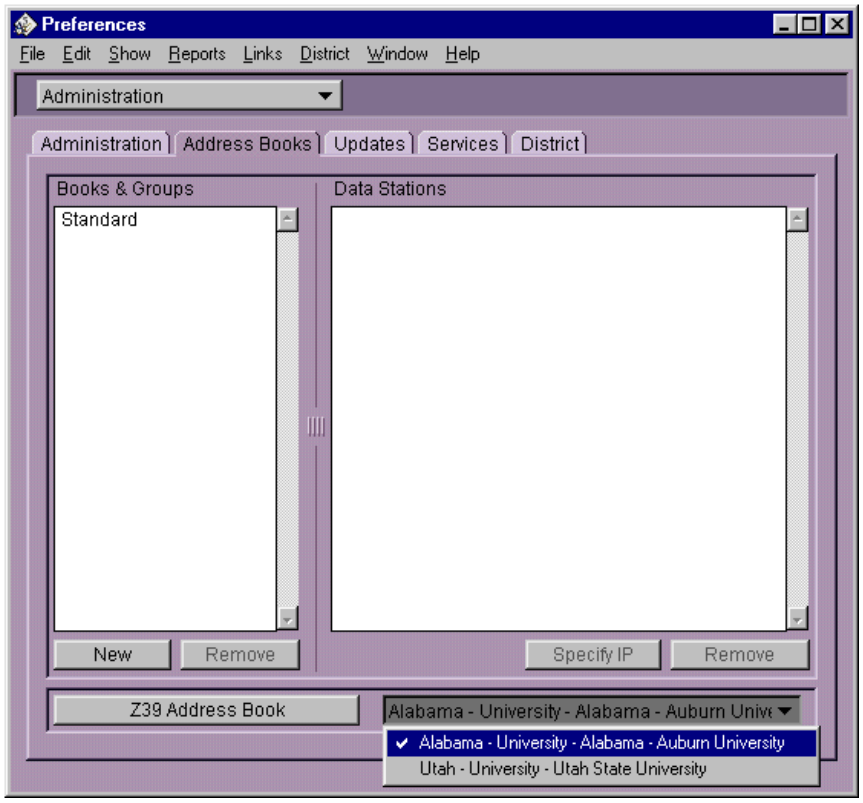
Configuring your system for Z39.50 access

Z39.50 is an international standard for communication primarily between computer library and information related systems. Z39.50 is becoming increasingly important to the future development and deployment of inter-linked library systems.

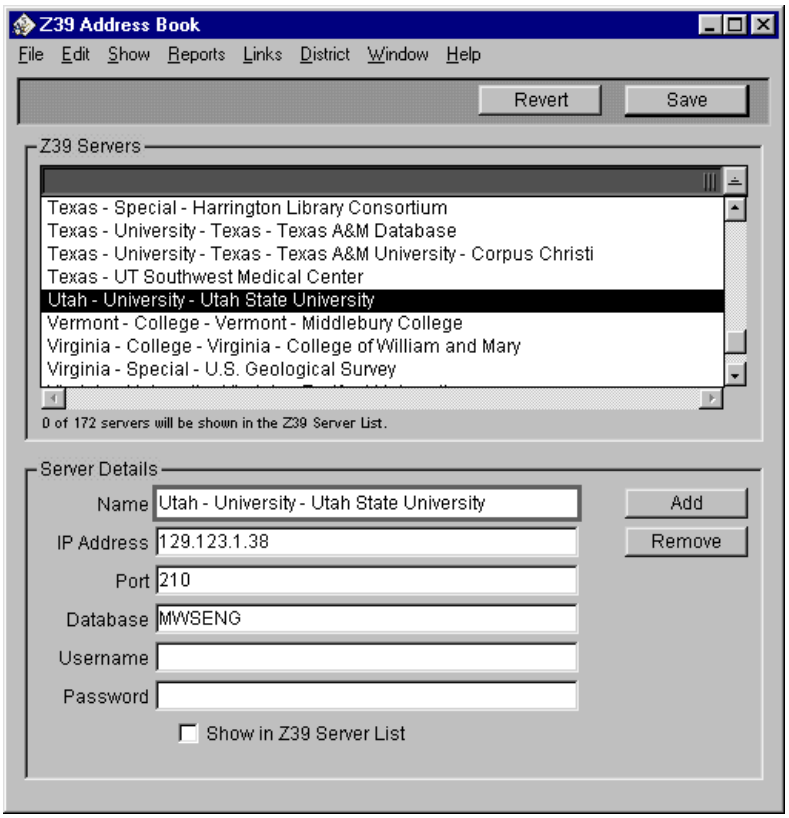
If you've purchased the Z39.50 Server option, your Alexandria Data Station will accept Z39.50 queries from standard Z39.50 clients.

The following are general steps required to gain access to other Z39.50 servers.

1. Select **Preferences** under the **Edit** menu.
2. Once in the **Preferences** window, select the **Address Books** tab.
3. If you've licensed use of the Z39.50 server, there will be a selectable **Z39 Address Book** button in the bottom left corner of the window. Click on it.



4. The following window will appears, including a list of all available servers.


Z39 Address Book
File Edit Show Reports Links District Window Help
Revert
Save
Z39 Servers
Texas - Special - Harrington Library Consortium
Texas - University - Texas - Texas A&M Database
Texas - University - Texas - Texas A&M University - Corpus Christi
Texas - UT Southwest Medical Center
Utah - University - Utah State University
Vermont - College - Vermont - Middlebury College
Virginia - College - Virginia - College of William and Mary
Virginia - Special - U.S. Geological Survey
0 of 172 servers will be shown in the Z39 Server List.
Server Details
Name Utah - University - Utah State University
IP Address 129.123.1.38
Port 210
Database MWSENG
Username
Password
Show in Z39 Server List
Add
Remove

5. At this point, you can select and edit individual Z39.50 servers or add entirely new ones.

NOTE:

Use the TCP/IP address of your Data Station for the Z39.50 Server Address. The Z39.50 server will use Port 210..

Z39 Address Book

Listed below are your options for configuring a Z39.50 Server. Remember that you need to **Save** after adding or changing information for each Server. Click the **Revert** button to restore the information to its previous format.

Name—The name of the Z39.50 Server; usually listed as institution name and/or location.

IP Address—The IP address of the Z39.50 Server. This field is required if you wish to connect to a specific Server.

Port—Default is Port `210`. Most Z39.50 servers will require use of this port.

Database—The directory location database name where files are stored.

Username—Some Z39.50 Servers require an access username and password.

Password—Some Z39.50 Servers require an access password and username.

Show in Z39 Server List—This checkbox allows you to add a specific server to a quick-access Server List located on the **Address Books** tab in the main **Preferences** window. The list appears as a pull-down menu located in the bottom-right corner of the window below the **Data Stations** field. This pull-down menu will remain blank until you add Servers from the list.

Add—Add a new Z39.50 Server to the list.

Remove—Remove one of the Z39.50 Servers from the list.

Orders, Vendors & Budgets

This chapter describes how to use Alexandria's Orders, Vendors, and Budgets functions.

- **Orders**—You can quickly order existing items and automatically add received items into your inventory.
- **Vendors**—You can define as many Vendors as you need in Alexandria. As you process orders, Alexandria keeps track of how much you've ordered from each Vendor.
- **Budgets**—You can define as many budget categories as you need in Alexandria. As you process orders, Alexandria keeps track of the amounts remaining in your various budgets.

The subsequent sections provide an overview of how to use these functions in Alexandria. Following the overview section, additional detail is provided.

Orders Management

Under the **Show** menu, access the **Orders** window. This window is used to manage purchase orders.

These powerful features will help you quickly and easily manage ordering and budgeting.

The ordering process works like this.

Step 1. Create a new Order. Its status is **Open**. Enter the items you want to order. You may have as many open orders as you like to help keep track of purchase requests.

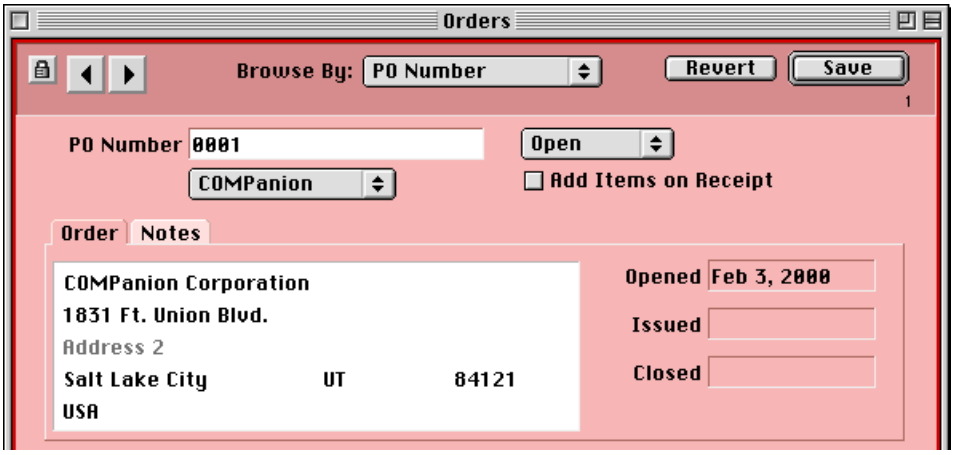
Step 2. Once you've completed the entry of an order, use the **Print** command from the **File** menu to print the current purchase order and mark it as **Issued**. When the order is issued, budgets are then **Committed** with the amounts on the purchase order. You cannot modify line items of issued orders.

Step 3. Wait to receive your order. If the entire order arrives in one shipment, use the **Receive Entire Order** menu command. If you receive a partial shipment, receive each line item separately.

Step 4. If you get impatient with your Vendor, print a **Claim Letter** demanding that outstanding items be delivered on a timely basis.

Step 5. If all the items in your order are received, the order is automatically **Closed**. However, if you believe that some items will NEVER be received, you may manually **Close** the order. Items that are not received are removed from the **Budget** and **Vendor Total Purchases** calculations.

Primary Information



Order Sequence Number—Alexandria assigns this number in the order that you create new orders. It's displayed in the top right side of the window and can not be modified by the user. In the window above, the sequence number is "1".

PO Number—Your purchase order number can contain up to 25 alphanumeric characters. Use it to identify your orders.

Vendor—Use the **Vendor** field to select the Vendor for this order. The Vendor's address is entered automatically in the **Order** tab. You may modify the order address if necessary. Add new vendors in Vendor Management *((see "Vendors Management" on page 258))*.

Order Status field—The order status is displayed in a pull-down menu at the top right of the order window. A new order has the status of **Open**. You may make changes to an **Open** order. Once the order has been printed or an item received, the status is automatically changed to **Issued**. **Issued** orders may not be modified except to receive items and adjust Discounts or shipping charges. Once the order is completed, it's given a status of **Closed**. **Closed** orders can't be modified.

Orders can be manually removed using the **Orders** menu. When an order is **Closed**, it's assumed that any remaining items are never going to be received. The amounts are removed from the committed budgets.

You may change the status of a **Closed** order to **Issued** or **Open**. If you do this, the budgets are adjusted to reflect the change. If you have not yet received any items for an order, its status may be reverted back to **Open** so that you can make changes. However, these types of changes should be done with care, since the original order may have already been sent to the Vendor.

Alexandria automatically keeps track of various statistics for you. As you add line items to an order, the budgets are updated to reflect a commitment of funds. When an order is **Closed**, the spent amount is updated for the associated budget and the amount is also added to the Vendor record to keep track of total purchases for each Vendor.

Opened—The date the order was first created. You cannot modify this date.

Issued—The date the order was issued to the Vendor. This date is set automatically when an **Open** order is printed. You can print an **Issued** or **Closed** order without modifying this date.

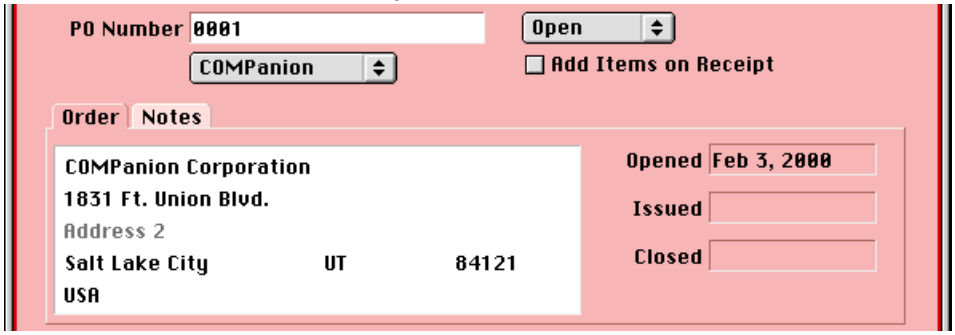
Closed—The date the order was last **Closed**. If a **Closed** order's status is changed to **Issued** or **Opened**, when you **Close** it again, this date is updated with the new **Closed**

date. A **Closed** order is considered complete. Any items that were not received are assumed *never* to be received and are removed from budget and Vendor totals as if those items were never in an order.

Add Items on Receipt—Click this box if you want Alexandria to automatically add items to the inventory when received. When items are added, you can assign them barcode numbers and other information. If you receive a diskette of Marc records for items purchased, do not check this option.

Order

Click the **Order** tab to view or modify the Vendor's address.



Vendor Name—The Vendor name you want used on this purchase order.

Vendor Address—The Vendor address you want used on this purchase order.

Vendor City—The Vendor City you want used on this purchase order.

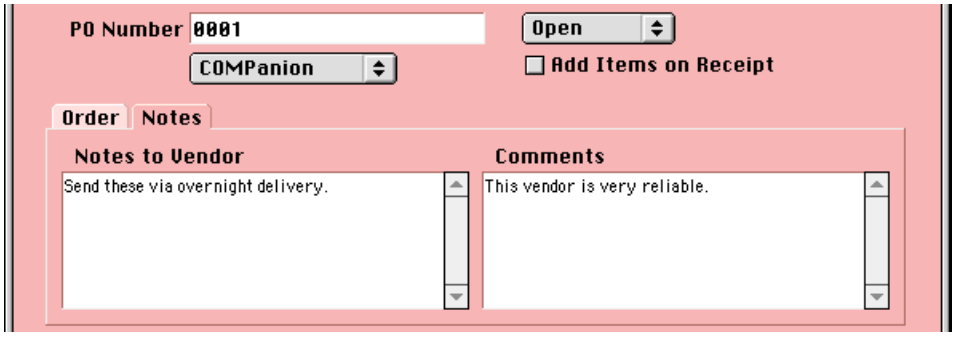
Vendor State—The Vendor State you want used on this purchase order.

Vendor Postal Code—The Vendor postal code you want used on this purchase order.

Vendor Country—The Vendor country you want used on this purchase order.

Notes

Click the **Notes** tab to enter notes about the order.

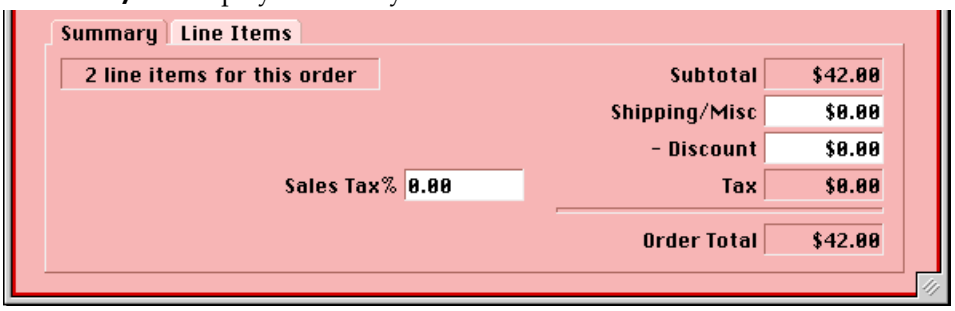


Notes to Vendor—These special instructions will be printed at the top of the purchase order. For example, "specify beginning barcode numbers" or "close order after 90 days."

Comments—These notes are for library use only and are not printed on the purchase order. Use this space to make notes to yourself regarding this particular order.

Order Summary

The **Summary** tab displays summary information about the order.



Subtotal—The total amount of all line items in your order. You can not modify this value.

Shipping/Misc—If additional costs are involved, enter them here.

Discount—If the order is discounted, enter the amount of the discount. This value will be subtracted from the Subtotal. If you want discounts itemized, enter them as line items with negative costs.

Sales Tax—The sales tax rate charged. The rate entered in the **Order Preferences** window *(see "Orders Preferences" on page 90)* is automatically entered. You may change it for each order.

Tax—The Sales Tax on this order. Computed as **Sales Tax%** x **Sub Total**.

Order Total—The total amount of the order. This is calculated as **Sub Total** - **Discount** + **Shipping/Misc** + **Tax**.

Order Budget Allocations

When an order status is changed from **Open** to **Issued**, the line item values are **Committed** for each associated budget. Thus, if you have 3 items worth $30 on order from your **Books** budget, then when the order is **Issued**, your **Books** budget committed value will increase by $90 (3 x $30).

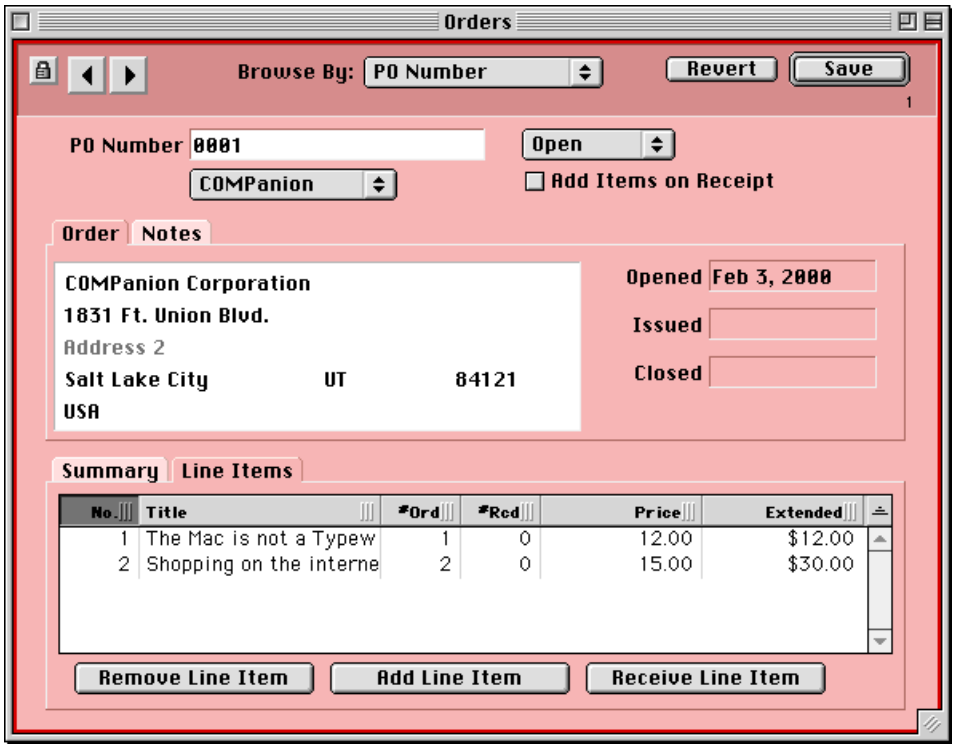
When an order status is changed to **Closed**, budgets are updated using the following rules.

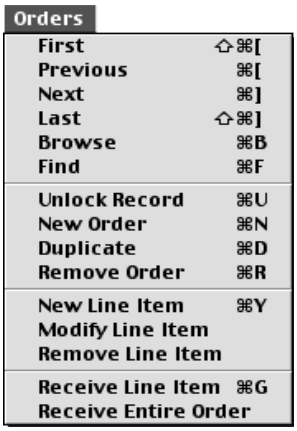
- Committed funds are removed.
- The subtotal is updated to match Received line items ONLY. Since you will not pay for unreceived items, they are removed from the total.
- A new Order Total is computed based upon **Sub Total** - **Discount** + **Shipping/Misc** + **Tax**
- Each received item's cost is adjusted by the ratio **Order Total**/**Sub Total** and this value is recorded as **Spent** for each associated budget.

In summary, when an order is issued, the line item cost associated with each budget are Committed. When an order is closed, the cost for each received item is adjusted to reflect discounts, shipping costs and taxes before they are recorded as **Spent** in the appropriate budget category.

Line Items

Click the **Line Items** tab to view information about a particular line item on an order.



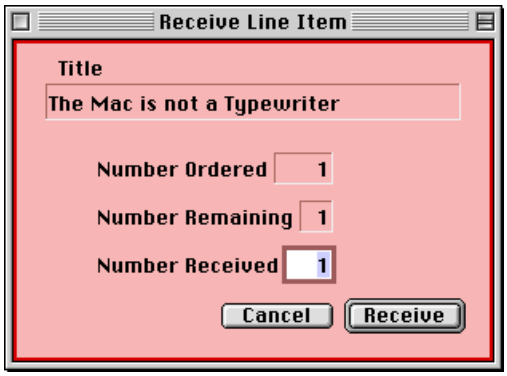


This tab is used to add, remove, receive, and examine the individual ordered items. To see the details of each line item, either double-click on the line or select the line and select **Modify Line Item** from the **Orders** menu. Depending upon the status of the order, certain commands may be disabled in the **Orders** menu. You can view line items sorted by the order they were added, or by Title. Simply click on the corresponding column header to sort.

If the order is **Open**, you may use the **Remove Line Item** button to remove the currently selected line item. The **Add Line Item** button can be used to add another line item. If the order is **Open** or **Issued**, you can use the **Receive Line Item** button to receive the items on the selected line.

The other buttons won't be active because you can't modify an **Issued** order. If you receive an item from an **Open** order, its status is automatically set to **Issued**. If you make a mistake in receiving a line item, Alexandria allows you to specify a negative **Quantity Received** to "undo" the receipt of items[1]. If the order is **Closed**, none of these buttons are active.

1. Thus, you can only "unreceive" as many items as you have already received. Thus, if you receive 10 of the 15 items and then discover this entry was in error, you can receive -10 of these items to "undo" the receipt which was recorded in erroneously.



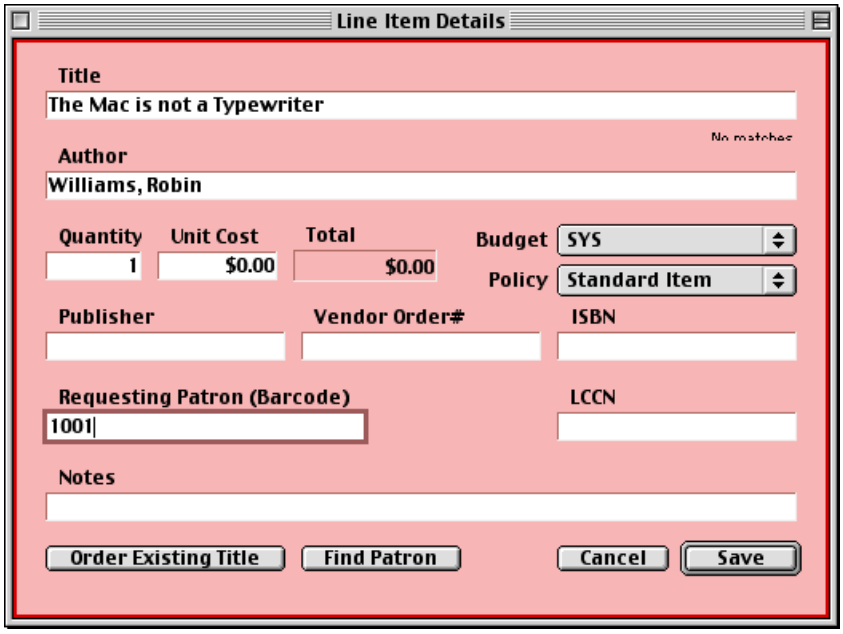
- SHORTCUT -

If you hold down the <alt|option> key and click on a line item, it will be recorded as received, just as if you clicked the **Receive Line Item** button and received all the copies ordered!

Once you've received an item, Alexandria will not allow you to modify or remove that line item. If you received the item in error, you can receive a negative quantity to reverse the entry.

Line Item Details

When an order is open, double-click a line item on the **Line Items** tab to view that item's details.



This window is used to enter information for each line item of your order. Except for the Title information, the rest of the fields can be filled in optionally. If you want to order a second copy of an item you already have in your collection, use the **Order Existing Title** button to locate the item you wish to order. When this button is clicked, Alexandria brings up the **Item Lookup by Title** window by which you locate the title you want to order. Alexandria will then automatically fill in most of the information on this window. You should always use this technique when you are ordering duplicate copies of items in your collection. This way, Alexandria knows you've ordered multiple copies and can add the new item information correctly when it's received.

When you add a new item to an order, you can specify the following information:

Title—Enter the title of the ordered item into this field. You must enter something in this field, otherwise the Vendor won't know what you are ordering. As you `<tab>` out of this field, Alexandria checks your local database, and if the title already exists, the system assumes you are adding additional copies to your library. You can also locate existing titles by using the **Order Existing Title** button at the bottom of the window.

Author—Enter the author of the ordered item into this field.

Quantity—The number of copies you're ordering. This number defaults to one.

Unit Cost—The cost of each copy.

Total—Cost of all copies as computed by Alexandria. You can't modify this number.

Budget—Select the budget code you want used for this line item purchase.

Policy—The policy code for this item once it's been added to the collection. The **Standard** policy is automatically selected. You may select any policy from the policy pull-down menu.

Publisher—This field is used to enter the publisher of this item.

Vendor's Order #—The Vendor order number of the item you're ordering.

ISBN—The International Standard Book Number. Many Vendors use this number for ordering purposes; however, it's optional for your ordering purposes.

LCCN—The Library of Congress Control Number. Some Vendors use this number for ordering purposes; however, it's optional for your ordering purposes.

Requesting Patron—You may enter the barcode number of the requesting patron if there is one. When the order is received, Alexandria will print a letter to that patron letting them know that the library has received the item. If the item is placed into inventory, the system will also automatically place an in-stock-hold on that specific item for the requesting patron. If you don't know the barcode of the patron, you can use the **Find Patron** button to search for the patron.

Notes—Comments for this line item. These are *not* printed on the order. The librarian can use these for any additional information.

Receiving Your Order

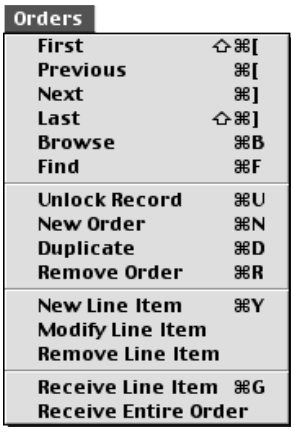
If you selected **Add Items on Receipt** in the **Order Entry** window, Alexandria will automatically display the item window so that you can add additional information for the received title. If you don't want to add the item shown, just click the **Cancel** button rather than the **OK** button.

If you don't select the **Add Items on Receipt** option, none of the received items are added into Alexandria's inventory. If you are receiving Marc records for these items, those would be added via import routines rather than this window.

If you are receiving an entire order, you'll get this window for each title in the order. If you click **Cancel**, you'll only be canceling the addition of the current title, the other titles will still be displayed. If you make mistakes after the order is received, you can use the **Items** window to modify the information you've entered.

If you are receiving an order for an existing title, the **Items** window for the existing title will be displayed and Alexandria will automatically add another copy for the newly received item.

The Vendor will automatically be identified on each copy entered into Alexandria, so it's not necessary to specify it in this window. Alexandria automatically places the order price as the cost of the item.



Order Commands

The **Orders** command menu at the top of this window includes commands to browse through your orders and to add or remove orders.

(see "Management Command Menus" on page 46) for information about the browsing commands: First, Pre**vious**, **Next** and **Last**.

Browse—Brings up the **Browse Orders** window.

Find—Brings up the **Find Record** window so the user can locate a specific Order record.

Unlock Record—Unlocks the current record for modification.

New Order—Select this command to create a new order.

Duplicate—Select this command to make a duplicate of the existing order. This is a very useful command. For example, if you want to split one order into several, duplicate it and then remove the line items you don't want from each order.

Remove Order—Select this command to remove an entire order. If the order is within the current financial year, Budget and Vendor statistics are immediately updated. In general, for most accurate reporting, you should only remove Orders outside the current financial year.

New Line Item—Select this command to add a new line item to the order.

Modify Line Items—Select this command to modify a selected line item. Performs the same action as double-clicking on a line item.

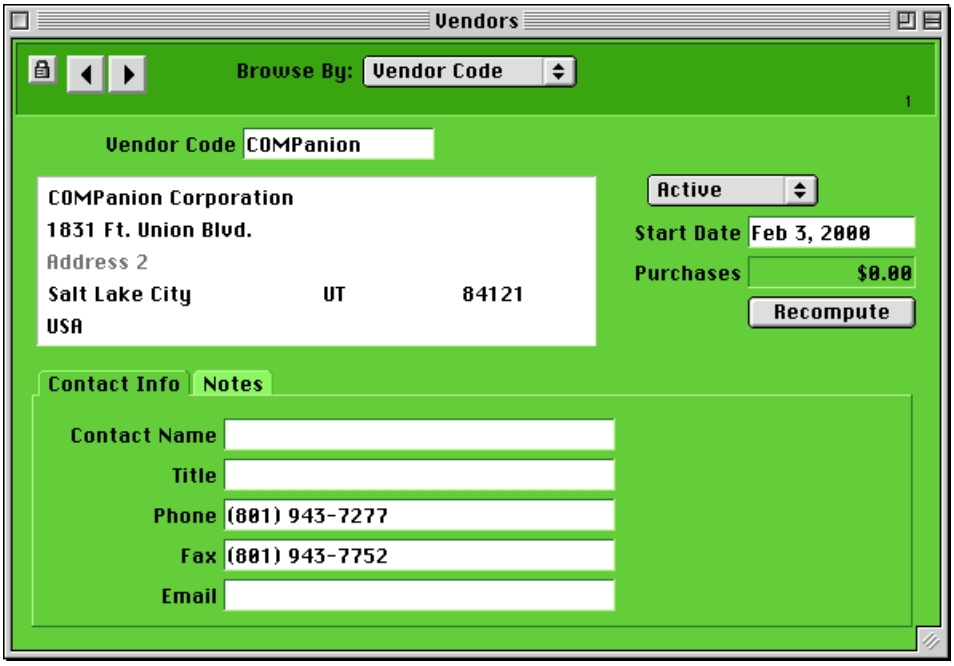
Remove Line Item—Select this command to remove a selected line item.

Receive Line Item—Select this command to receive the selected line item.

Receive Entire Order—Select this command to receive all items on a current order.

Vendors Management

Under the **Show** menu, access the **Vendors** window for managing Vendor records. You can setup as many different Vendors as you require.



Primary Information

A Vendor record consists of the following information:

Vendor Sequence Number—Alexandria assigns this number in the order that you create new Vendors. It's displayed in the top right side of the window and cannot be modified by the user.

Vendor Code—Enter a short name for this Vendor. This is the name that is displayed in pull-down menus throughout the system for the selection of Vendors. Vendor codes must be unique; that is, they may not be repeated for other Vendors.

Company Name—The full name of the Vendor company.

Address—The Vendor order street address. This is the address that all P.O.s are addressed to.

City—The city where the Vendor is located.

State—The state or province where the Vendor is located.

Postal Code—The Vendor's postal code.

Country—The country where the Vendor is located.

Status—Vendors that you are currently using should have an **Active** status of. If a Vendor has an **Inactive** status, its code will not be displayed in any of the Vendor selection pull-down menus used in the system. Note: you won't be able to refer back to this Vendor record except for this window.

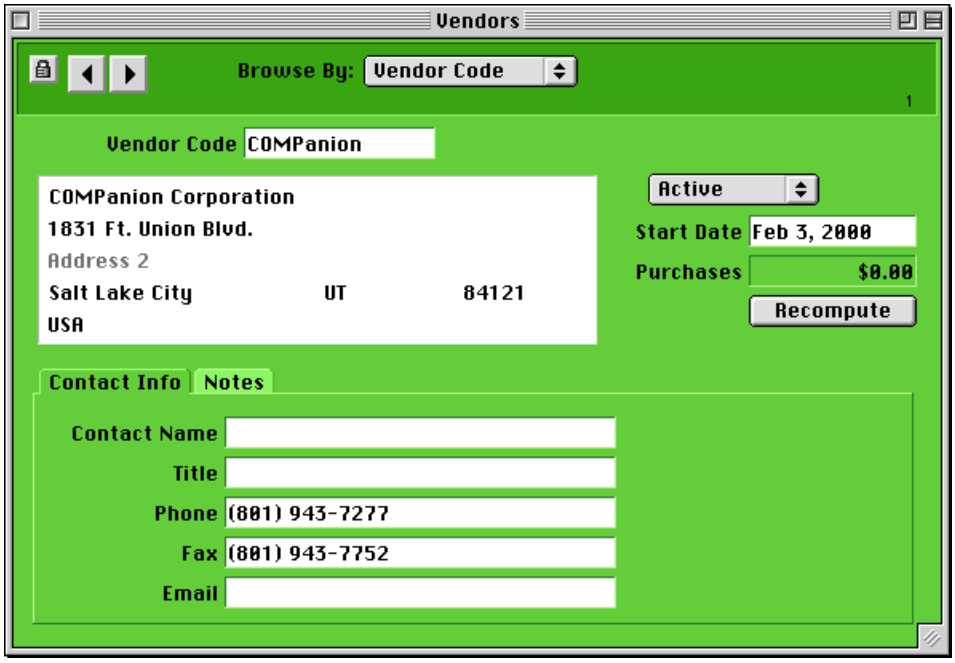
Start Date—The date from which the **Purchases** value is computed. When you first add a Vendor, this contains the date they were added. However, should you ever clear Vendor purchase statistics, this date will be reset to the date the purchase statistics were cleared.

Purchases—The dollar amount of the completed (i.e. **Closed**) purchases (using the **Closed** date) since the **Start Date.** You can not modify this field except by using the **Recompute** button or placing orders. Thus, when an order is **Closed**, and its **Closed** date is AFTER the purchased **Start Date**, the received total is added to the Vendor **Purchases** total.

Use the **Recompute** button to force Alexandria to examine all **Closed** orders for this Vendor and total the values since the **Start Date**. Typically these calculations are performed automatically as orders are added or removed—and when the Start Date value is changed. However, in the event that these calculations could be wrong, the **Recompute** button forces Alexandria to compute new values.

Contact Info

This tab contains information about the person to contact at the Vendor site.



Contact Name—The name of your contact person.

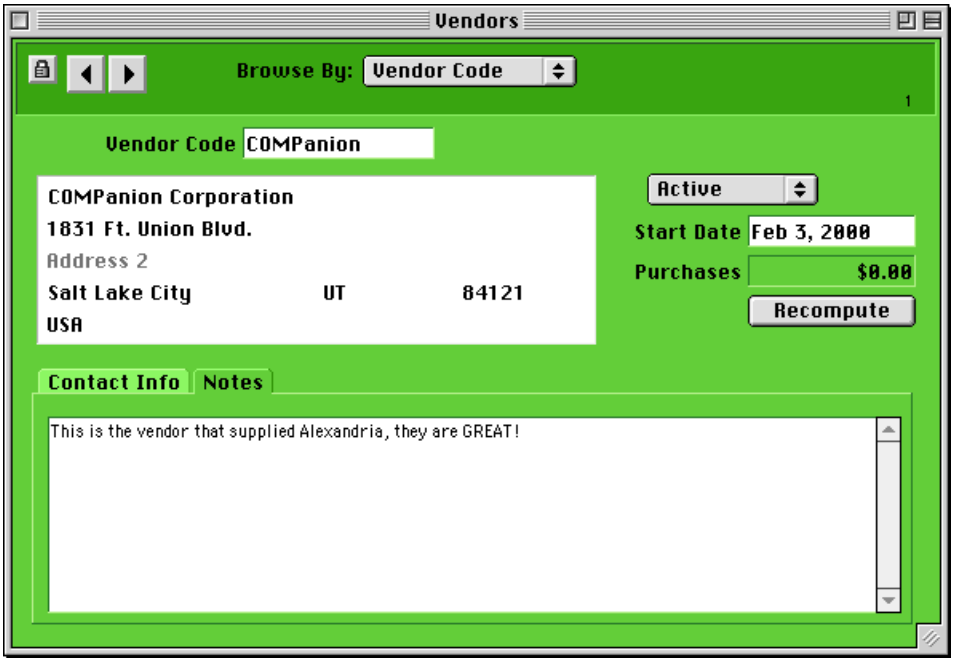
Title—The title of your contact person.

Phone—The contact person's phone number.

Fax—The contact person's Fax number.

Email—The contact person's Email address.

Notes



This tab contains additional Vendor information. Enter as much information as necessary regarding the salespeople, managers, product quality, specialization, and ordering information.

Vendor Commands

The **Vendors** menu at the top of the window includes commands to browse through your Vendors and to add or remove them.[1]

Browse—Brings up the **Browse Vendors** window.

Find—Brings up the Find window so the user can locate a specific Vendor record.

Unlock Record—Unlocks the current record for modification.

New Vendor—Select this command to add a new Vendor.

Duplicate—Select this command to add a new Vendor based upon the same information from the current Vendor. Note: **Start Date** and **Purchases** will not be copied.

Remove Vendor—Select this command to remove an existing Vendor. Vendors that are used by Order or Subscription records can not be removed.

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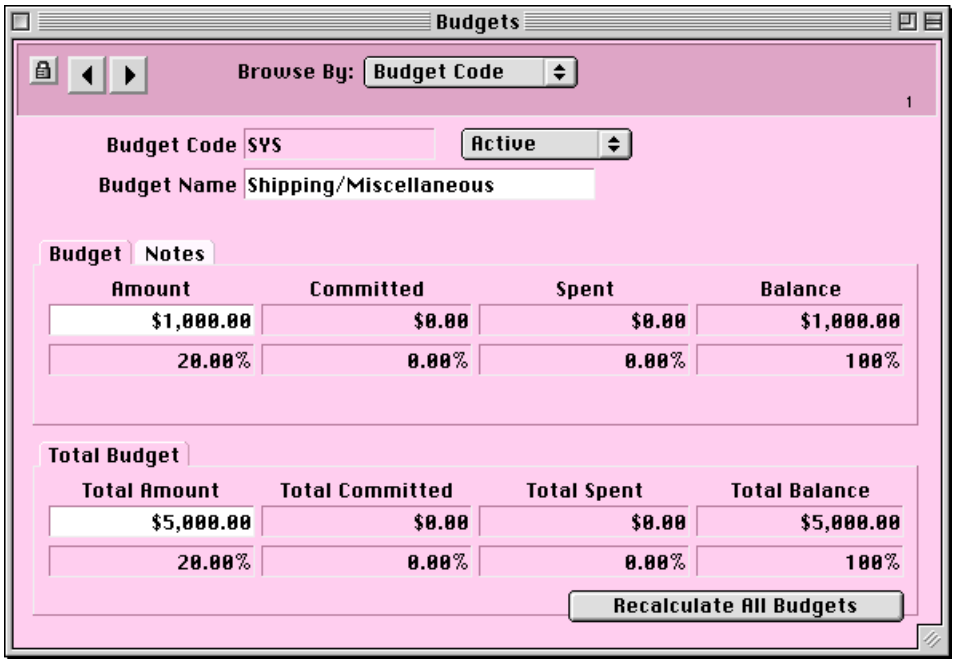
1. (see "Management Command Menus" on page 46) for information about the browsing commands: **First**, **Previous**, **Next** and **Last**.

Budgets Management

Under the **Show** menu access the **Budget** window. This window is used to manage budget records. You can select as many different budget categories as you require for your library. The total library budget is always displayed at the bottom of the window for reference purposes.



Budget records consist of the following information:

Budget Sequence Number—Alexandria assigns this number in the order that you create new Budgets. It's displayed in the top right side of the window and can not be modified by the user.

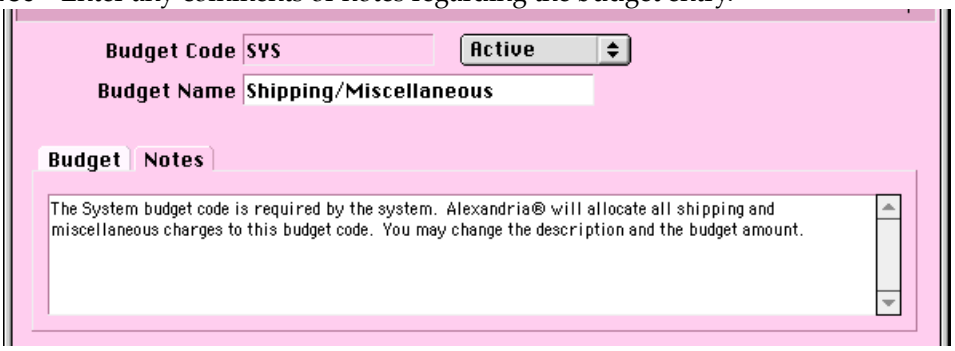
Budget Code—Enter a short name for the budget. This is the name that is displayed in pull-down menus throughout the system for the selection of budgets. Budget codes must be unique; that is, they may not be repeated for other budgets.

Budget Name—A full description of the budget. For example, if money comes from an individual, enter the individual's name here. If the money comes from the general fund, type in "`General Fund`".

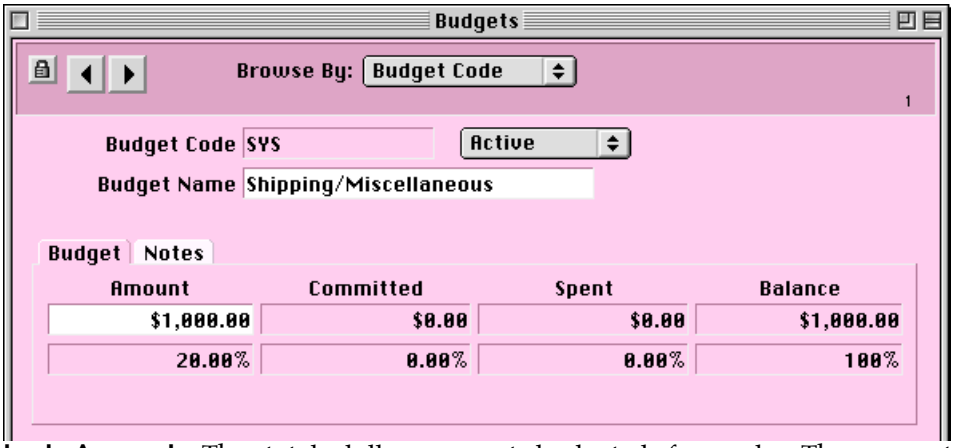
Status

Budgets that you are currently using should have an **Active** status. If a budget has an **Inactive** field status, its code will not be displayed in any of the budget selection pull-down menus used (i.e. you won't be able to refer to this budget record).

Notes—Enter any comments or notes regarding the budget entry.


Budget Code SYS
Active
Budget Name Shipping/Miscellaneous
Budget
Notes
The System budget code is required by the system. Alexandria® will allocate all shipping and miscellaneous charges to this budget code. You may change the description and the budget amount.

Budget Details



Budget Amount—The total dollar amount budgeted for code. The percentage displayed below this number represents the portion of the total library budget that this entry uses.

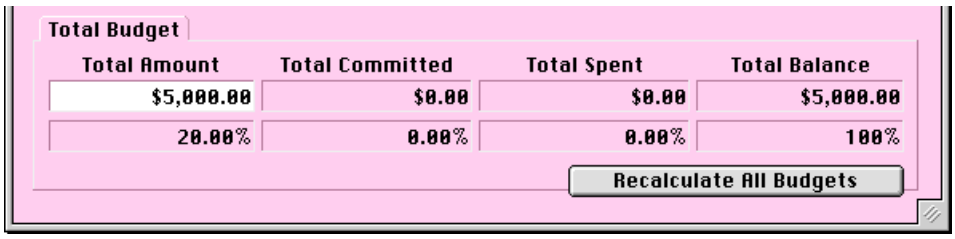
Committed—The total dollar amount of the current budget committed. Money is committed when purchase orders are **Issued**. This number cannot be modified from this window. The percentage displayed below it is the percentage of its budget which is currently Committed.

Spent—The total dollar amount of the budget that has been spent. When an order is **Closed**, all the committed values for received items from this order are moved to Spent. This number cannot be modified from this window. The percentage displayed below it is the percentage of its budget which is currently Spent.

Balance—The remaining amount in the budget category. It's computed by taking the budget amount minus the amount committed and spent. The percentage displayed below it is the percentage of the budget remaining (*for more details on how these values are computed, (see "Order Budget Allocations" on page 252)*).

Total Budget

The total budget for your library is displayed at the bottom of the budget window. Typically, your library budget is set once—but can be changed at any time.



The Total Budget tab includes the following information.

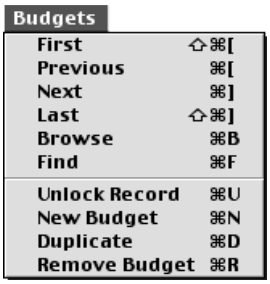
Total Budget—The total dollar amount of the library budget. You may change this value at any time. The percentage displayed below is the percentage of budget which is currently allocated to budget categories.

Total Committed—The total dollar amount committed by all purchase orders. This amount is automatically updated as purchase orders are **Issued**. This number cannot be modified from this window. The number displayed below is the percentage of your total budget which is currently **Committed**.

Total Spent—The total dollar amount spent. This amount is automatically updated as purchase orders are **Closed**. This number cannot be modified from this window. The percentage displayed below this is the percentage of your total budget which is currently **Spent**.

Total Balance—The remaining amount in the library budget. It's computed by taking the library budget minus the amount committed and spent. The percentage displayed below is the percentage of the total budget which is currently remaining.

Click on the **Recalculate All Budgets** button to force Alexandria to rebuild all budget values from orders within the specific financial year *((see "Orders Preferences" on page 90) for more information)*. Typically, budget calculations are automatically updated as orders are added, modified or removed. However, in the event that these values are wrong, this button forces a recompute of all values.



Budget Commands

The **Budgets** menu at the top of the window includes commands to browse through your budgets and to add or remove budgets.[1]

Browse—Brings up the **Browse Budgets** window.

Find—Brings up the Find window so that the user can locate a specific Budget record.

Unlock Record—Unlocks the current record for modification.

New Budget—Select this command to add a new budget.

Duplicate—Select this command to add a new budget based upon information from the current budget. **Committed** and **Spent** balances will not be copied.

Remove Budget—Select this command to remove an existing budget. Budgets that are used by existing Subscription or Order records can not be removed.

1. (see "Management Command Menus" on page 44) for information about the browsing commands: **First**, **Previous**, **Next** and **Last**.

Subscriptions & Routes

Most libraries have subscriptions to periodicals. Alexandria's subscription management features help you keep track of your library's subscriptions—including their cost, frequency, location, and the patrons who request them.

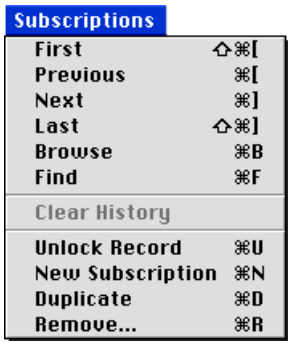
Subscriptions Management

Under the **Show** menu, access the **Subscriptions** window. This window is used to help keep track of all the subscriptions for your library.

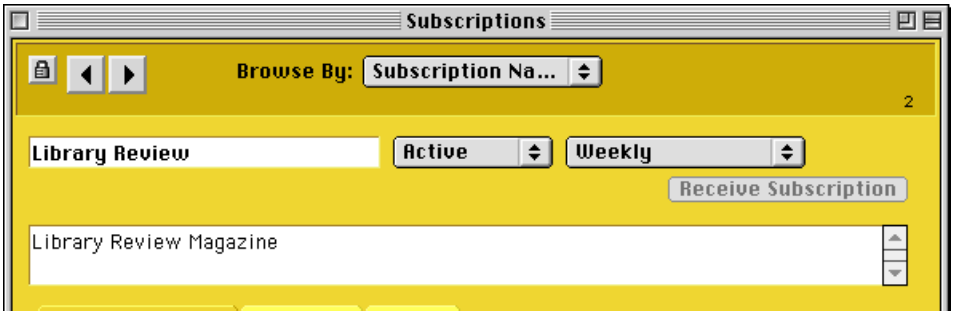
When a subscription is received, Alexandria will record that you've received it; if you've selected **Inventory on Receipt**, Alexandria will automatically add the item into your current inventory.

When an item is received, you can instruct Alexandria to automatically print a routing slip for the item.

Every time an item is received, Alexandria reduces the number of issues remaining and keeps the receipt in the subscription's History Log. You can confirm the receipt of all issues by examining the History Log.



Subscription Primary Information



Subscription Code—Enter a short name for the subscription here. If you receive more than one copy of a particular subscription, number each one. For example, if you receive two subscriptions of National Geographic, number them "`NationalGeo1`" and "`NationalGeo2`". This code is used throughout Alexandria when selecting subscriptions. Subscription codes must be unique and can't be used for other subscription records.

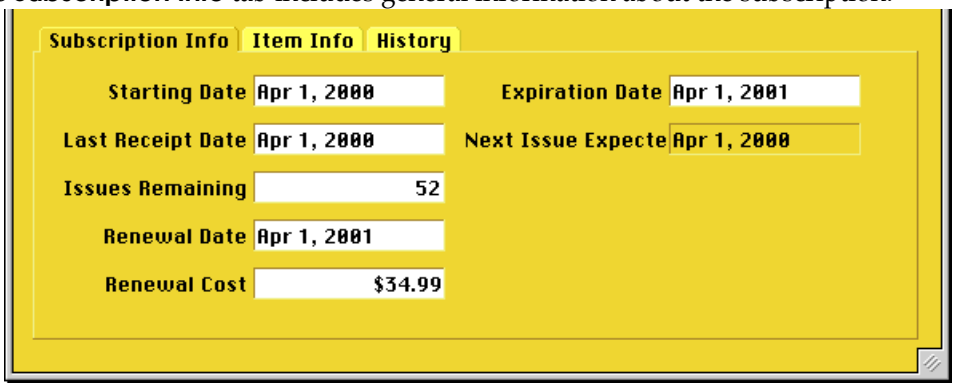
Subscription Description—This field contains the full description of the subscription. The librarian may enter any further information regarding the subscription. This information will be used as the initial title when you inventory or receipt.

Frequency—Use this pull-down menu to select the subscription frequency.

Receive Subscription—Click on this button to receive the subscription. Typically, you'll receive the subscription from the **Circulation** window; this control is available for convenience *(see "Receive Subscription" on page 192 for more information)*.

Subscription Info

The **Subscription Info** tab includes general information about the subscription.



Starting Date—Enter the starting date of the subscription here. This information is used solely for your reference; it is not used for any Alexandria reports or calculations.

Expiration Date—Enter the date the subscription expires. This information is used solely for your reference; it is not used for any Alexandria reports or calculations.

Last Receipt Date—This field records the date the last issue was received. This is updated when the "`Receive Subscription`" command is used. Alexandria uses this date to determine if an issue is past due.

Next Issue Expected—This field contains a date based on the subscription frequency and shows when the next issue is expected. This information is used solely for your reference—it does not impact any Alexandria calculations.

Issues Remaining—This field contains the number of issues remaining in the subscription. As you receive issues, this number is decreased to reflect the correct number of issues remaining. If you renew a subscription early, add the number of issues purchased to the **Issues Remaining** number.

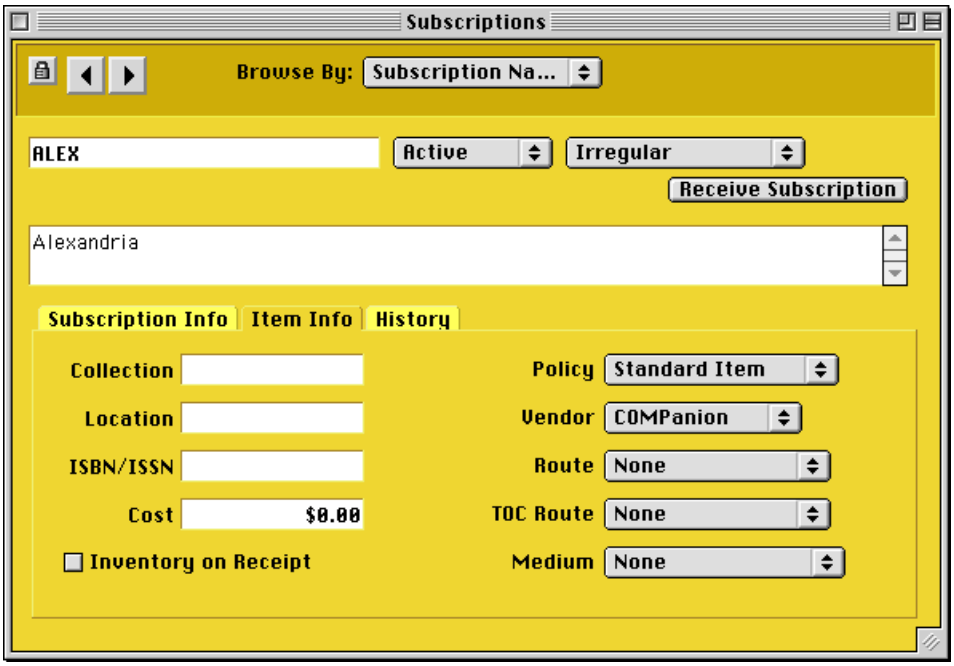
Renewal Date—Enter the date you should renew the subscription. Alexandria uses this date in renewal reports as a reminder of when subscriptions need to be renewed.

Renewal Cost—Enter the cost of the subscription renewal. Use this cost to help manage library budgets. This information is used solely for your reference and is not used for any Alexandria calculations.

NOTE:
The last receipt date is most likely NOT the same as the issue date of the item.

Subscriptions Item Info

Click the **Item Info** tab to view information about a particular item.



Collection—When an issue is received, it is assigned this Collection code.

Location—When an issue is received, it is assigned this Location code.

NOTE:
The **Policy** can be changed after the item is received.

ISBN / ISSN—Enter the ISBN or ISSN for the periodical here. This information is used solely for librarian reference and is not used for any Alexandria calculations.

Policy—Use this pull-down menu to select which policy will be assigned to an issue when it's received.

Vendor—Use this pull-down menu to select the Vendor from whom the subscription was purchased. Use it to order and renew subscriptions. If you don't want to track the Vendor, select **None**. If you wish to add a new Vendor, select **Add New Vendor** from the pull-down menu and a window will appear from which you can add new Vendors to your system.

Route—Select the routing slip you want printed when the issue is received. If you don't want a routing slip printed, select **None**. The issue is checked out to the Route's Responsible Patron automatically when the routing slip is printed.

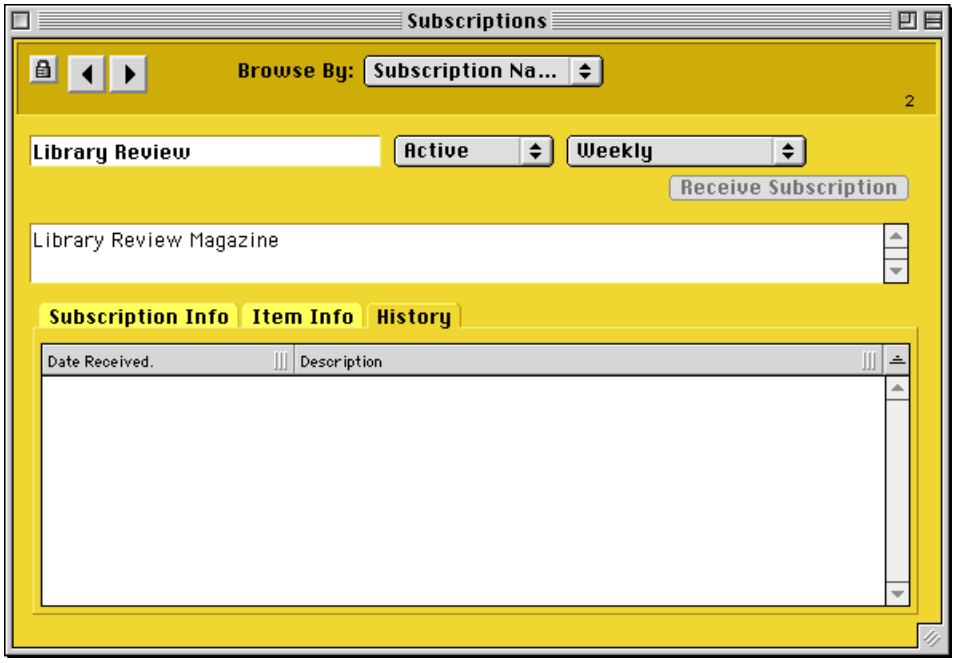
TOC Route—Prints a Table of Contents routing slip when an issue is received. This is used to attach a photocopy of the items Table of Contents (or for any other purpose the library would need a routing slip). It's assumed that the item isn't circulating so the item is not checked out to the Responsible Patron.

Medium—Medium code to assign to this record.

Inventory on Receipt—When this box is checked, Alexandria will ask you to add the received item into inventory. If you don't select this, received items are not automatically prompted for addition when they are received. Many libraries don't inventory high frequency items and instead use the temporary check out capability if those items need to be checked out. Alexandria will automatically place the Receipt Date after the Subscription Name when the new record is added.

Subscriptions History

Click the **History** tab to view the subscription's receipt history. The receipts are listed with the most current at the top of the list.



History information includes the date received, the Alexandria user who received it, and the number of remaining issues. To edit the history, double-click on the history entry to change.

Step 1. You can clear history lines by selecting them and pressing the <delete> key on the keyboard. Use the **Clear** command under the **Edit** menu to clear *all* **History** lines.

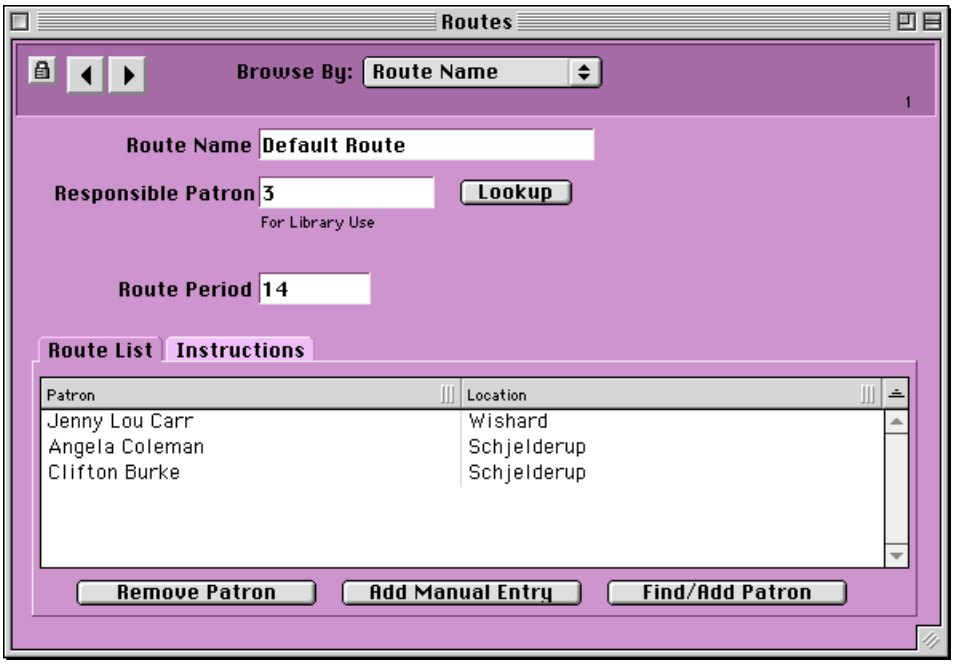
Routes Management

Under the **Show** menu, access the **Routes** window. This window is used for managing routing records. You can set as many different routes as required for your library. Routing lists are used to direct items supplied by the library to a specified list of readers.

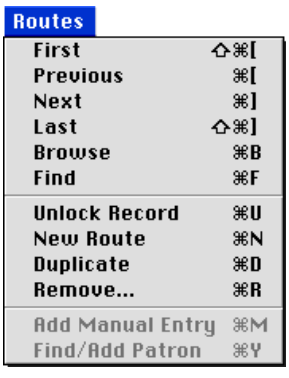
Many times, the librarian will need to route an item to a number of different patrons. Alexandria's Routing List Manager helps the librarian keep track of these various lists. Every routing list has a responsible patron associated with it. When items are routed, Alexandria checks out the item to this responsible patron. Routes are also assigned a routing period, the time period that the librarian expects the item to be circulating before it's returned to the library.

Routes contain a routing list, which contains the names and addresses of the people on the route list. An additional instruction field is included so the librarian can enter additional instructions for the route.

Routes can be assigned to subscriptions so that they are issued when the subscription is received. However, any collection item can be routed using the **Circulation** window *(see "Issue Routing Slip" on page 193 for more information)*.



Routes Primary Information



A route record consists of the following information:

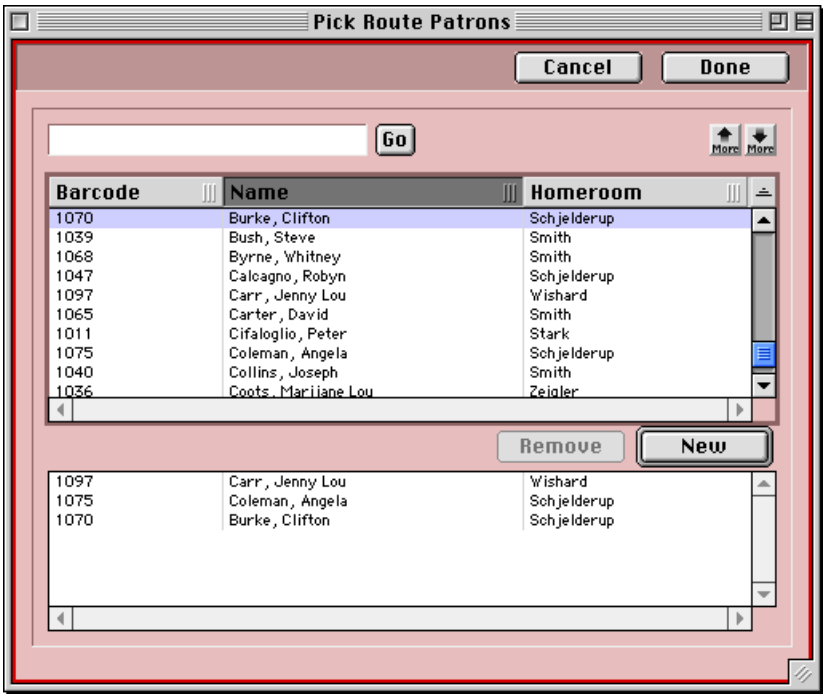
Route Name—The name you've selected for this route.

Responsible Patron—The **Responsible Patron** is the barcode of the patron responsible for this route. When an item is distributed it's checked out to the **Responsible Patron**. Default is **Patron #3**, the **For Library Use Patron**; however, items routed with this patron will be filtered off all reports unless explicitly requested. Use the **Lookup** button to find patron barcodes based upon their names.

Routing Period—The **Routing Period** is used to compute a due date for the route. If something that is routed is not returned to the library, it is reported as an overdue item for the **Responsible Patron**.

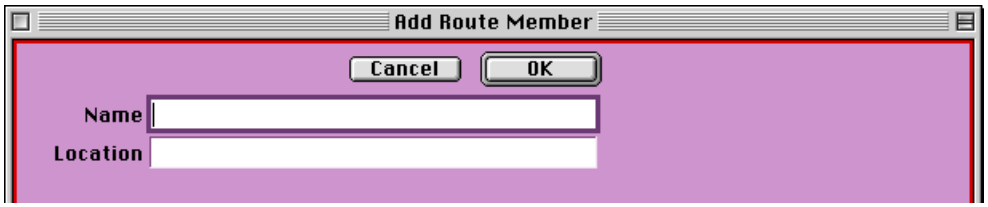
Route List

Click the **Route List** tab to view and edit the list of patrons on the route list. Use the **Find / Add Patron** button to add a patron to the route list. When you click this button, the **Pick Route Patrons** window appears. Double-click a patron in the list or select them and click on the **New** button to add them to the route list. As you add patrons, they are displayed on the bottom of this window. When finished, press the **Done** button to add all the selected patrons to the routing list.



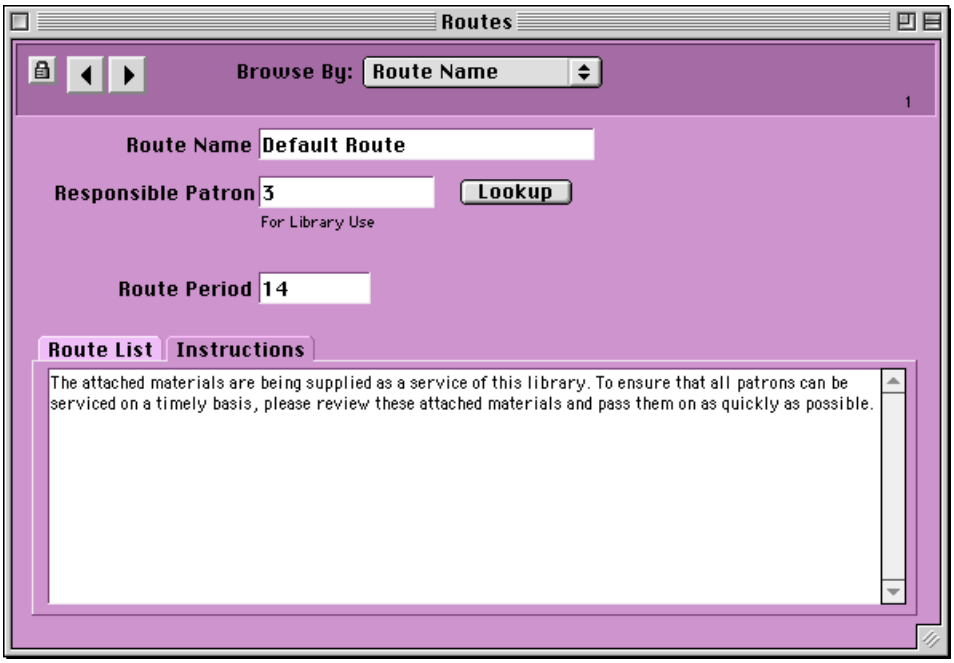
Once added, you can remove patrons from the routing list by selecting them and pressing the <delete> key on the keyboard, or using the **Remove** button.

To add a patron who is not in the Alexandria system, use the **Add Manual Entry** button.



Route Instructions

Click the Instructions tab to add special instructions with your routes. Instructions are printed at the top of the route form.


Routes
Browse By:
Route Name
1
Route Name
Default Route
Responsible Patron
3
Lookup
For Library Use
Route Period
14
Route List
Instructions
The attached materials are being supplied as a service of this library. To ensure that all patrons can be serviced on a timely basis, please review these attached materials and pass them on as quickly as possible.

Routing forms are automatically printed when the library receives a subscription with a route specified or issued a route from circulation; however, you can print the current form at any time by selecting **Print** from the **File** menu. If you want to print more than one routing list, use Subscription Reports in the **Reports** menu.

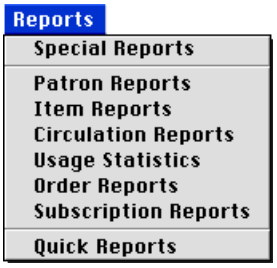
Introduction to Reports

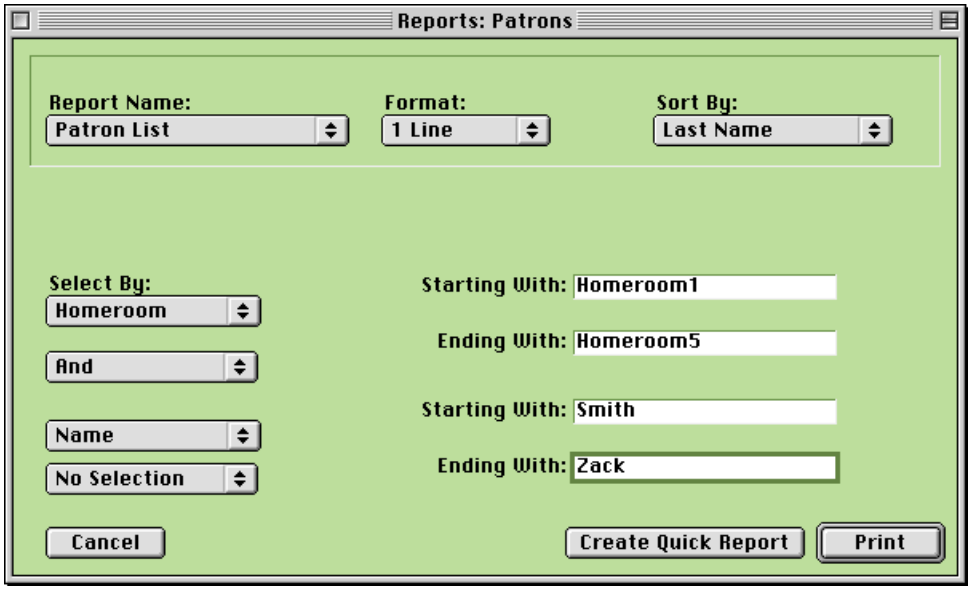
Alexandria's reporting function provides a simple-to-use interface to generate hundreds of reports for nearly all the data saved within Alexandria.

This chapter provides an overview of the report preparation process and instructions on how to create and use **Quick Reports**. For specific report information see the subsequent chapters.

How to Create a Report

To generate a customized report in Alexandria, choose the report type you want from the **Reports** menu. In the example below, **Patron Reports** was selected from the **Reports** menu. This sample shows the general form of the report window for all types of reports. The specific fields on any report window vary depending on the report and format you have selected.



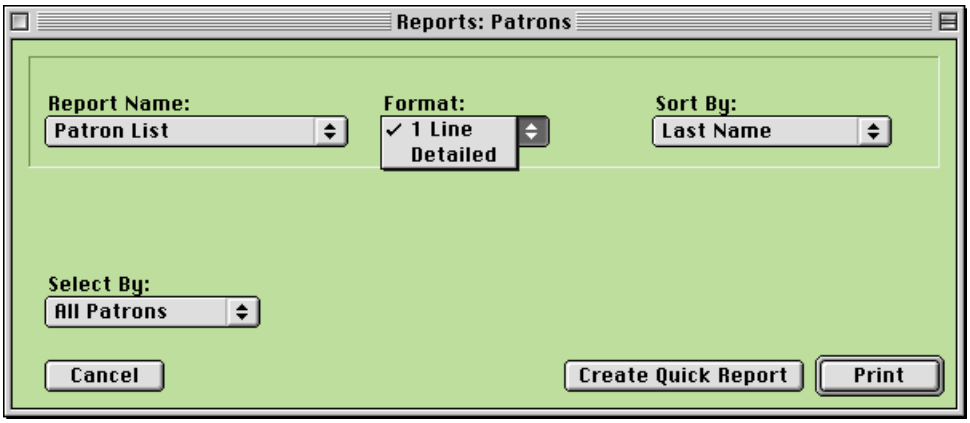


Use the following general steps to prepare a report.

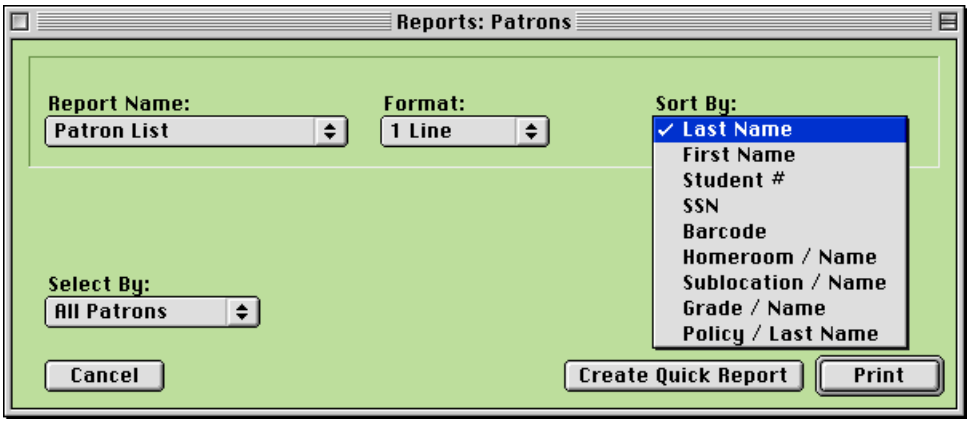
Step 1. Select a specific report type from the **Reports** menu.

Step 2. Once the window has opened, select a specific report type from the **Report Name** pull-down menu.

Step 3. If the report you have selected has more than one format, a **Format** pull-down menu will appear. For example, some reports have a **1-Line** and **Detailed** format. Select a format from the **Format** pull-down menu.

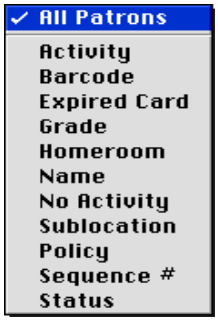


Step 4. Select a sort order from the **Sort By** field[1]. The sort order determines how records are included in the report. For example, on Patron Reports you can sort by Name, Barcode, Policy, and other values. Some sort selections sort by two values. For example, for a Patron List you can choose a sort of **Level/Name** and the report will be sorted by level and then by name.



Step 5. Use the pull-down menus below the **Report Name** pull-down menu to select which records are to be included in the report. You can make as many selections with **AND**, **OR**, and **AND NOT** (Boolean logic) as you require for your report. However, you'll need a large monitor to see all your choices since the window will continue to grow downward with every choice.

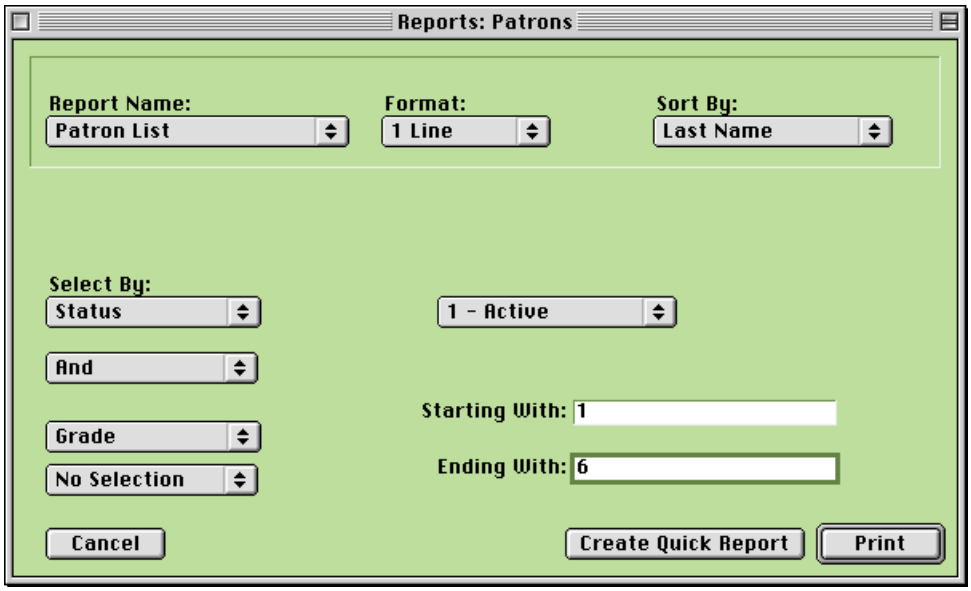
When you choose values in the selection pull-down menus, other fields may appear and prompt you for other required information. For example, if you select **Level** in the selection pull-down menu, the window asks for you to enter a starting and ending value.



If you enter only a **Starting with** selection, Alexandria will select all

1. Since Alexandria allows you to customize certain terms for Patrons and Items, the term names you use may not be reflected in this manual. For purposes of illustration, the sample library we've used in this manual is a School Library and thus Community ID = Patron Number, Location = Homeroom, Level = Grade and so forth.

records where the Grade begins with the entered text. For example, entering "GR1" would select "GR100", "GR10" and "GR1B37".



Step 6. Click the **Print** button. As Alexandria builds your report, the status of the report appears at the top of the Report Results window as the report is created.

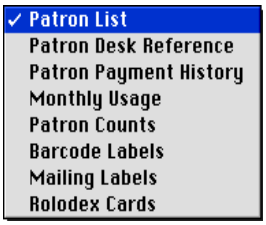
Step 7. As the report is processing, you can perform other tasks within Alexandria. For example, you can check items in and out or even prepare another report. Click the **Cancel** button to stop the report from processing.

If the Report window is hidden behind other windows, select the Reports window option from under the **Windows** menu.

NOTE:
The settings for the window are initially set to "locked" so you can't accidently modify the report.

When the report is complete, it appears in a standard word processing window. Since the report is a standard word processing document, you can:

- View and edit the report on the screen using standard word processing commands.
- Choose **Save** on the **File** menu to save the report.
- Highlight text in the window and copy it to other programs or onto your desktop.
- Select **Print** from the **File** menu to print the report. Due to operating system limitations, you may only print one report at a time.



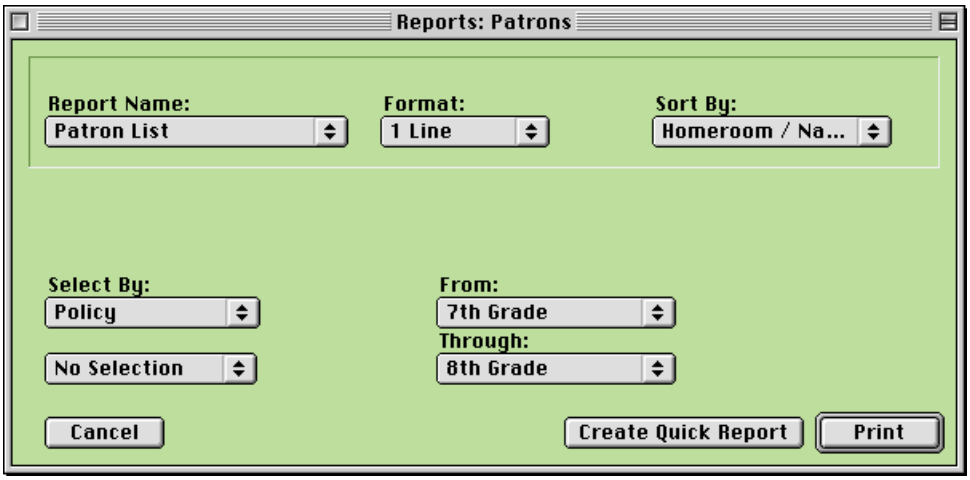
Creating Quick Reports

Alexandria includes a **Quick Report** capability to make it very easy to save the most frequently-used reports. This saves the specifications that were used to prepare the report, however, and does not save the results of a previous report. Since all reports are standard word processing documents, you can save the actual report like any other document.

Use the following steps to create **Quick Reports**.

Step 1. Select a report from the **Reports** menu.

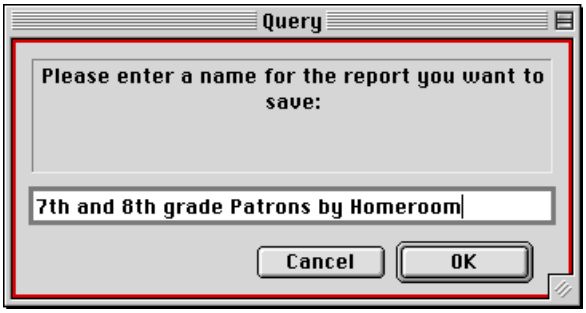
Step 2. Select all the options you want for this saved report template.



NOTE:

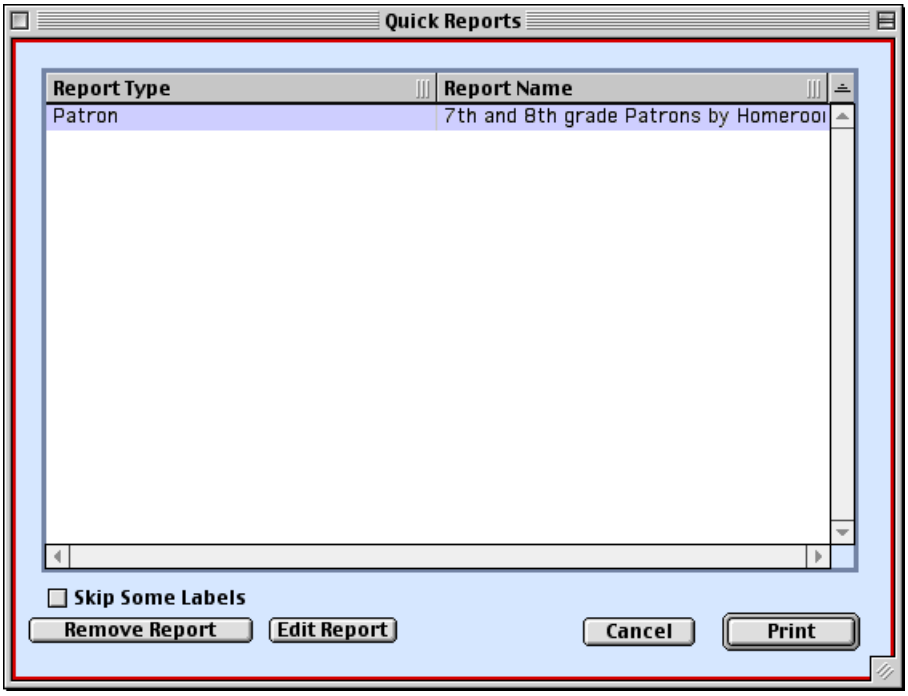
You can not change the name of a Quick Report although you can remove the one with the "bad" name and create another.

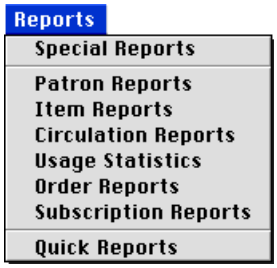
Step 3. Click on the **Create Quick Report** button. When the following dialog comes up, give the Quick Report format you just created a name.



Step 4. Click on **OK** to save the Quick Report you just created, otherwise click **Cancel**.

Step 5. To view your saved report formats/templates, select **Quick Reports** from the **Reports** menu.

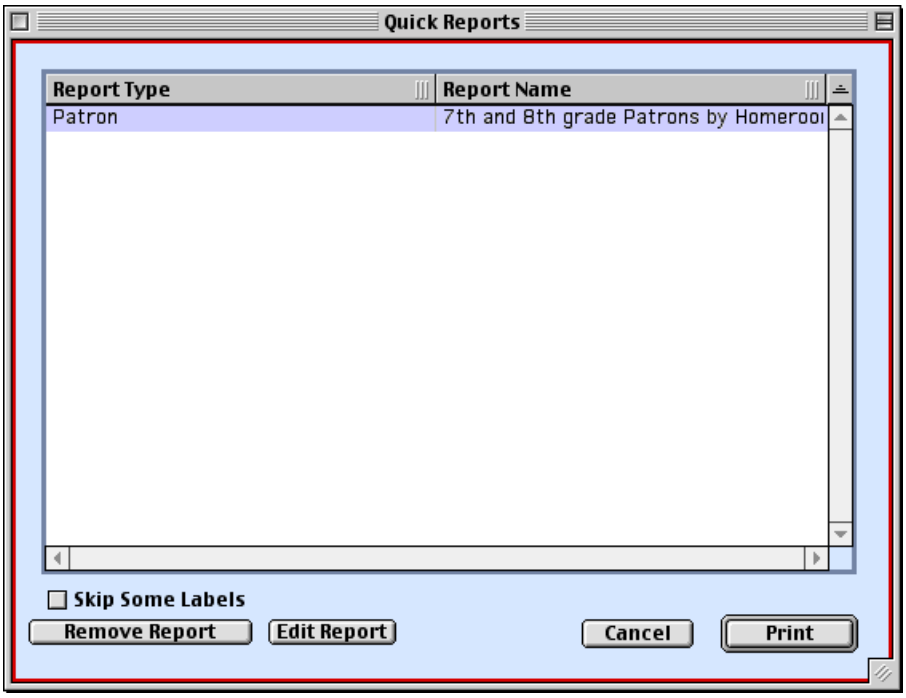




Using Quick Reports

Use the following steps to use the Quick Reports you've saved.

Step 1. Select **Quick Reports** from the **Reports** menu.



Step 2. Double-click on one of the report names or select a report and click **Print** or select **Print** from the **File** menu to prepare the saved report.To remove a Quick Report, select it and click the **Remove Report** button.

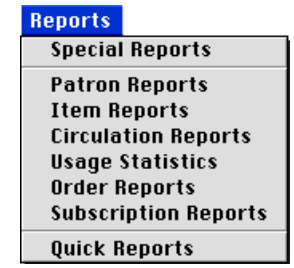
Step 3. To edit a Quick Report, select it and click the **Edit Report** button. Make the necessary changes and click **Save**.

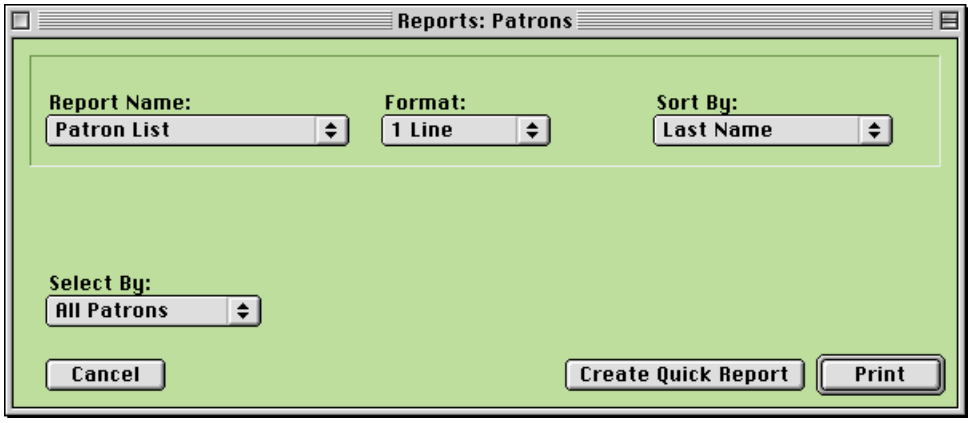
Patron Reports

Preparing Patron Reports

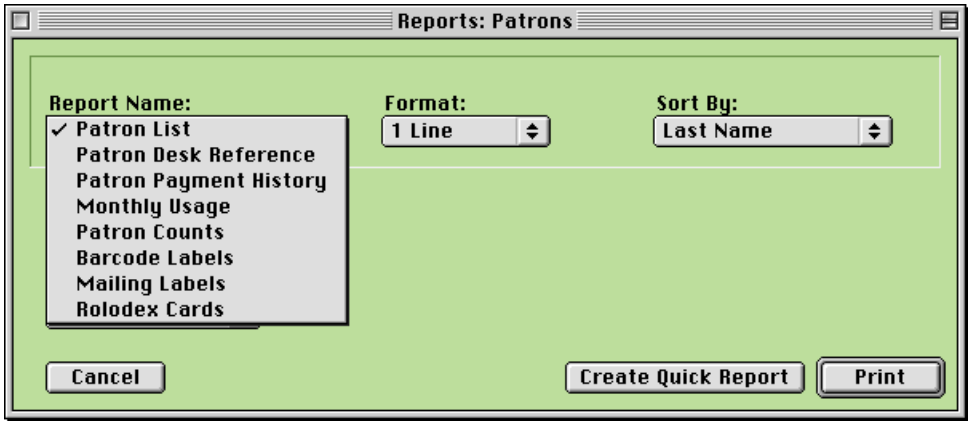
Patron reports give you immediate access to information about the patrons who use your library. Patron reports include Lists, Notices, Cards and Labels. To prepare a Patron Report, follow these steps:

Step 1. Choose **Patron Reports** from the **Reports** menu.

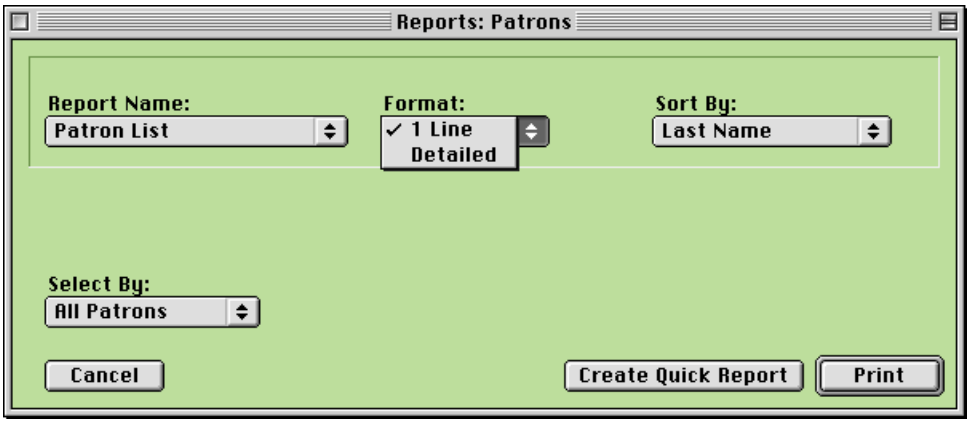




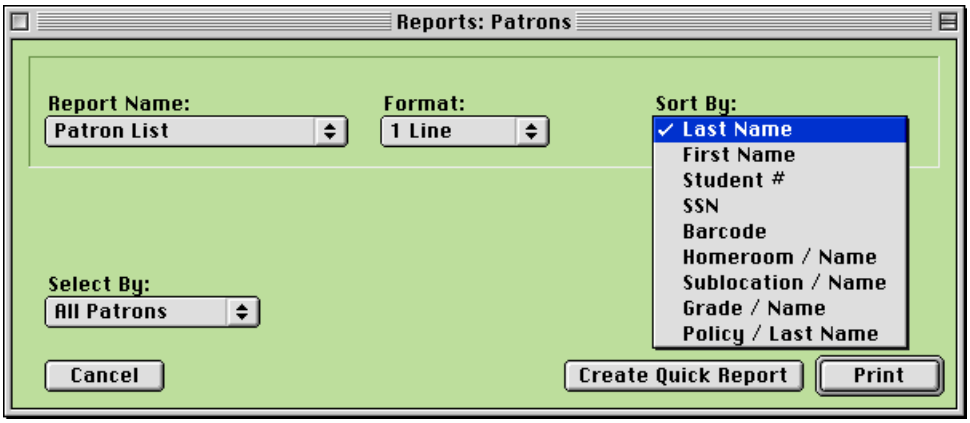
Step 2. Choose the type of report you want from the **Report Name** pull-down menu.



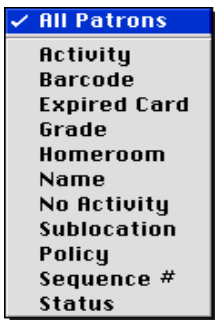
Step 3. Choose whether you want to have your Report **Format Simple** or **Detailed** by selecting the desired display.

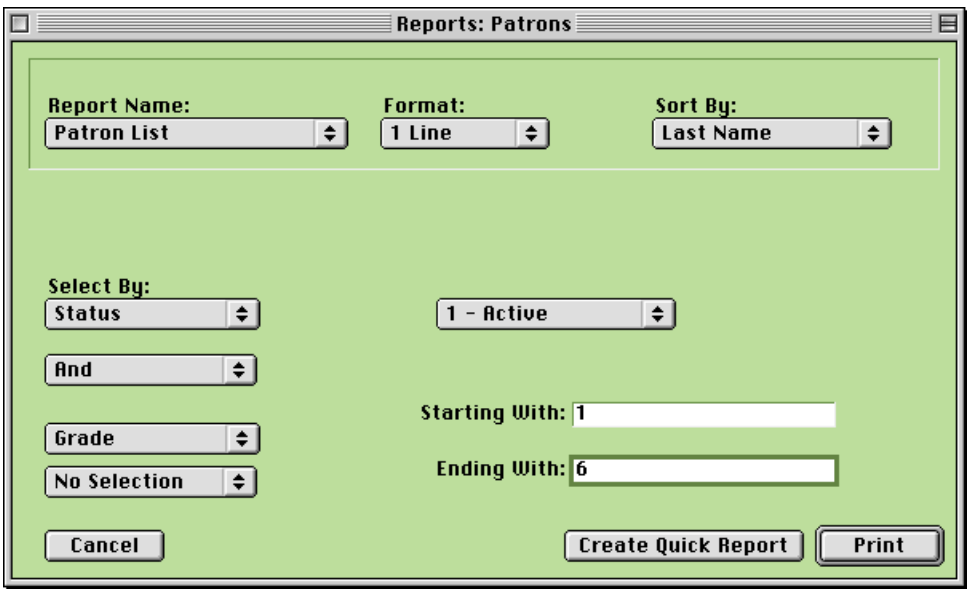


Step 4. Choose the order by which you want this report sorted under the **Sort By** pull-down menu.

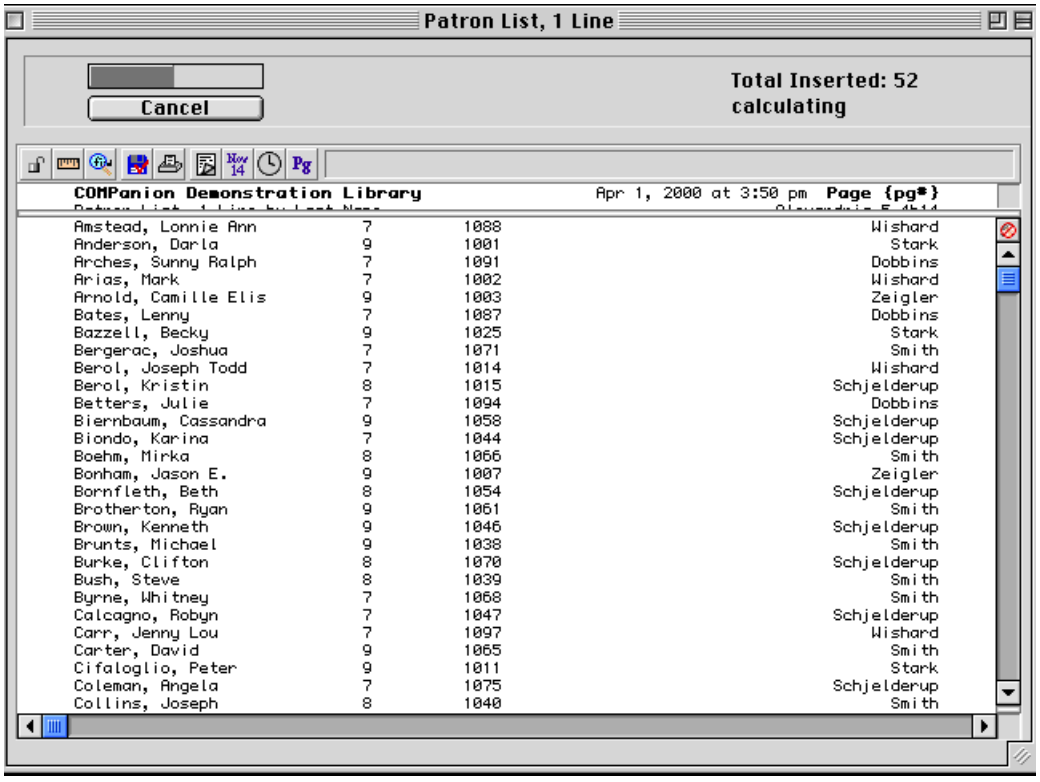


Step 5. Use the **Select By** pull-down menu to select what patron record information to include in this report.





Step 6. Click on the **Print** button to prepare the report.


Patron List, 1 Line
Cancel
Total Inserted: 52
calculating
COMPanion Demonstration Library
Apr 1, 2000 at 3:50 pm Page {pg#}
Amstead, Lonnie Ann 7 1088 Wishard
Anderson, Darla 9 1001 Stark
Arches, Sunny Ralph 7 1091 Dobbins
Arias, Mark 7 1002 Wishard
Arnold, Camille Elis 9 1003 Zeigler
Bates, Lenny 7 1087 Dobbins
Bazzell, Becky 9 1025 Stark
Bergerac, Joshua 7 1071 Smith
Berol, Joseph Todd 7 1014 Wishard
Berol, Kristin 8 1015 Schjelderup
Betters, Julie 7 1094 Dobbins
Biernbaum, Cassandra 9 1058 Schjelderup
Biondo, Karina 7 1044 Schjelderup
Boehm, Mirka 8 1066 Smith
Bonham, Jason E. 9 1007 Zeigler
Bornfleth, Beth 8 1054 Schjelderup
Brotherton, Ryan 9 1061 Smith
Brown, Kenneth 9 1046 Schjelderup
Brunts, Michael 9 1038 Smith
Burke, Clifton 8 1070 Schjelderup
Bush, Steve 8 1039 Smith
Byrne, Whitney 7 1068 Smith
Calcagno, Robyn 7 1047 Schjelderup
Carr, Jenny Lou 7 1097 Wishard
Carter, David 9 1065 Smith
Cifaloglio, Peter 9 1011 Stark
Coleman, Angela 7 1075 Schjelderup
Collins, Joseph 8 1040 Smith

A window similar to the one above should appear, depending on individual selection.

Step 7. Make any desired changes using the Word Processor tools.

Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu.

Patron Report Formats

This section describes each of Alexandria's patron report formats and shows a sample of each. See the subsequent sections for **Sort** and **Selection** options.

Patron List—This report prepares a wide range of information about the patrons using your library.

There are two formats for the patron list.

> **1 Line—**This format provides minimal information for each patron you select, including only the patron's Name, Level, Barcode, Community ID and Location.
>
> **Detailed—**This format includes all available information for the patrons that you select. This includes Name, Address, Phone Number, Status, Card Expiration Date, Date of Last Use, Policy, Patron ID, Birth, Sex, Location, Level, Sublocation, Graduation Year, Contact and Contact's Phone Number.

Patron Desk Reference—This report acts as a desk reference for the librarian. It contains a printed Barcode and patron information about each selected patron, including Name, Address, Location, and Phone Number. This report is useful if patrons do not have (or have lost) a library card with a printed Barcode. The printed Barcode on the desk reference can be scanned to make the patron current.

You can use the Sort Options on this report to make it more useful. For instance, if patrons visit your library by Location (i.e. Homeroom), you can sort the desk reference by Location. As the children visit the library, you can quickly locate the students on the desk reference under their Location and scan the Barcode label.

Patron Payment History—This report is a detailed list of all payments made to the library by patrons. It includes the patron's Name, Barcode Number, and information regarding each Payment Date, Type of Payment, Amount of Payment, and the Barcode Number of the item against which the payment was made.

Monthly Usage—This report shows the patrons' life-to-date library usage by month. Use this report to see the usage pattern for all patrons or a group of patrons. For example, to compare the library usage of Eighth graders against that of the Ninth graders, sort this report by Policy. More so, to discover how often suspended patrons used the library in the past year, compile a report using all suspended patrons.

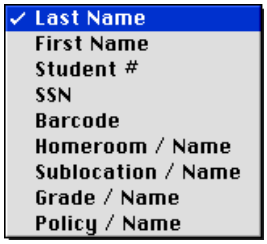
There are two formats for the monthly usage report.

> **1 Line—**This provides a 1-line summary of selected patrons' life-to-date library usage by month and totals all the usage for the selected patrons.
>
> **Detailed—**This provides a detailed summary of the selected patrons' library usage by month and their total life-to-date usage. The report includes each patron's Name, Barcode Number, Patron ID, and Monthly usage total for the past year, and a life-to-date usage total.

Patron Counts—This report provides an exact number of patrons who are suspended, how many patrons have expired cards, or how many patrons fall under a particular policy. The only information this report provides is the total number of patrons meeting the selected range criteria.

Barcode Labels—This report prints a Barcode label for each selected patron. The label includes the patron's Name, the Barcode Number, and the Barcode.

Mailing Labels—This report prints a mailing label for each selected patron. This form is designed for page printers with three labels across and down.



Rolodex Cards—This report prints a Rolodex card for each selected patron. The Rolodex cards show the patron's Name, Barcode, Barcode Number, Level, Location, Phone Number, and Address.

Contact COMPanion for paper pricing and stock.

Sorting Options for Patron Reports

Use the **Sort by** pull-down menu to select the order in which you want the patrons included in your report. For example, you can sort the report by Name or by Barcode Number.

The following is a list of **Sort by** values for patron reports.

Last Name—The report is sorted by the patron's full Name in "Last Name, First Name" format.

First Name—The report is sorted by the patron's full Name in "First Name, Last Name" format.

Community ID—The report is sorted by the patron's Community ID field.

Government ID—The report is sorted by the patron's Government ID.

Barcode—The report is sorted by the patron's Barcode number.

Homeroom, Name[1]**—**The report is sorted by the patron's Location (typically Homeroom for schools), and within each Location, by the patron's Name. Each Location will begin on a new page.

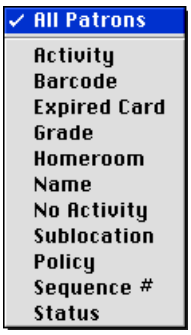
Option, Name[2]**—**The report is sorted by the patron's Sublocation, and within each Sublocation by the patron's Name. Each Sublocation will begin on a new page.

Grade, Name[3]**—**The report is sorted by the patron's level, (typically Grade in school-based systems), and within each level, by the patron's Name. Each level begins on a new page.

Policy, Name—The report is sorted by the patron's Policy Name, and within each Policy Name by the patron's Name. Each new Policy Name will begin on a new page.

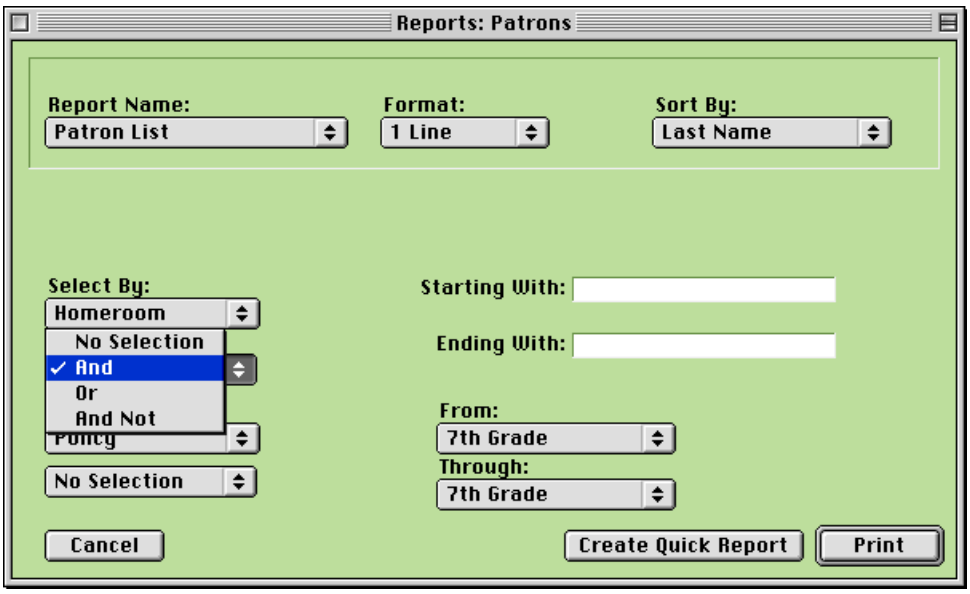
---

1. Alexandria will use your customized name for Location. In this example it's Homeroom.
2. Alexandria will use your customized name for Sublocation. In this example it's Option.
3. Alexandria will use your customized name for Level. In this example it's Grade.



Selection Options for Patron Reports

Use the **Select By** pull-down menu to select which patrons you want included in the report. For example, you can select patrons included with a certain level or patrons with expired library cards.



You can enter as many values for selection criteria as you need using **AND**, **OR**, and **AND NOT** (Boolean Logic). When you choose values in the selection pull-down menus, other fields appear, prompting you for **Starting With** and **Ending With** values.

> **- NOTE -**
>
> Unless you *specifically* select them, patrons with Barcodes under the number 50 are NOT included in the reports. If you specifically want to include patron's with Barcodes less than 50, use the Barcode selection option. In addition, only Patrons with an **Active** status are included. If you want to specifically include patrons with all statuses, choose **All** from the status pull-down menu or choose the exact status you'd like.

The following is a list of selectable values for patron reports.

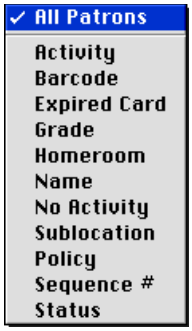
All Patrons—This report includes all the patrons for whom you have records including those who have Barcode numbers under 50 and a **Status** of **Active**.

Activity—This report includes patrons who have used the library within specified dates. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the "far future." If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the "far past." If you don't enter any date, the **Starting Date** is set for one year in the past.

Barcode List—This selection allows the librarian to enter or scan non-sequential barcodes to appear on the report. Duplicate entries will only print once. This list can be selected with the **Select All** command under the **Edit** menu and copied to use in selecting for other reports.

Barcode Range—This report includes patrons with barcodes between the selectable **Starting with** and **Ending with** ranges. If you only want information on one patron, enter the patron's Barcode number as the **Starting with** value. Also, if you don't specify otherwise, only Barcodes greater than the number 50 are included in the report.

Birthdate—This selection includes all patrons with birthdays in the specified range. If you enter only an End date, it will sort every birthday ON or BEFORE that date.



Expired Card—This report includes patrons whose cards will expire as of the specified date. If you do not enter a date, the beginning of the next month is used as the selected date. Thus, your report would include all patrons whose cards will expire at the end of the current month.

Level—This report includes patrons with **Levels** between the **Starting with** and **Ending with** ranges. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the data begins with the entered text if you only enter an Ending With level, Alexandria will select all levels before and up to the selected level. If you enter no text, the selection is ignored. The default name for **Level** in a school library is typically **Grade**.

Location—This report includes patrons with **Locations** between the **Starting with** and **Ending with** ranges. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the Location begins with the entered text. For example, entering "HR1" would select "HR100", "HR10" and "HR1B37". If you enter no text, the selection is ignored. The default name for Location in a school library is typically **Homeroom**.

Name—This report includes patrons with **Names** (in last Name, First Name 0rder) between the **Starting with** and **Ending with** ranges. Use this to compile reports for all patrons within a particular family, or to print lists selected from any alphabetical range of Names. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the data begins with the entered text. If you enter no text, the selection is ignored.

No Activity—This report includes patrons who have not used the library within the specified date range. If you enter only a **Starting Date**, the ending date is assumed to be in the "far future." If you enter only an **Ending Date**, the **Starting Date** is assumed to be in the "far past." If you don't enter any date, the **Starting Date** is set one year in the past.

Sublocation—This report includes patrons with **Sublocation** between the **Starting with** and **Ending with** ranges. If you enter **only** a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the Sublocation data begins with the entered text. If you enter no text, the selection is ignored. The default name for **Sublocation** is **2nd Location**.

Policy—This report includes patrons with **Policies** between the **Starting with** and **Ending with** ranges. For example, if you only want to select patrons under Alexandria's default patron policy (Standard Patron), select the report by policy and choose Standard Patron as the **Starting With** (and **Ending With**) value.

Sequence #—This report includes patrons with **Sequence numbers** between the **Starting with** and **Ending with** range. This option is helpful in identifying new patrons or patrons added to the system in a particular order. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the data exactly matches the entered text. If you enter no text, the selection will be ignored.

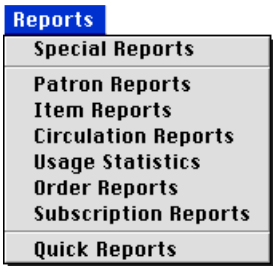
Status—This report includes only patrons with the status you specify. Select **All** to choose **All Status** codes. If you don't specify a particular status, only **Active** patrons are included on the report.

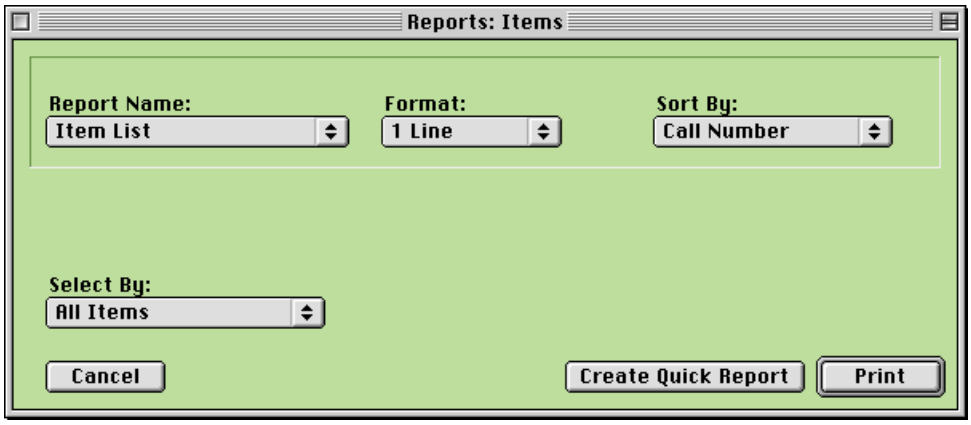
Item Reports

Preparing Item Reports

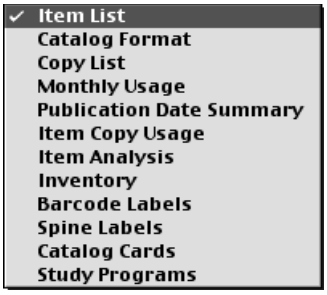
Item reports give you immediate access to information about the items in your collection. To prepare an Item Report, follow these steps.

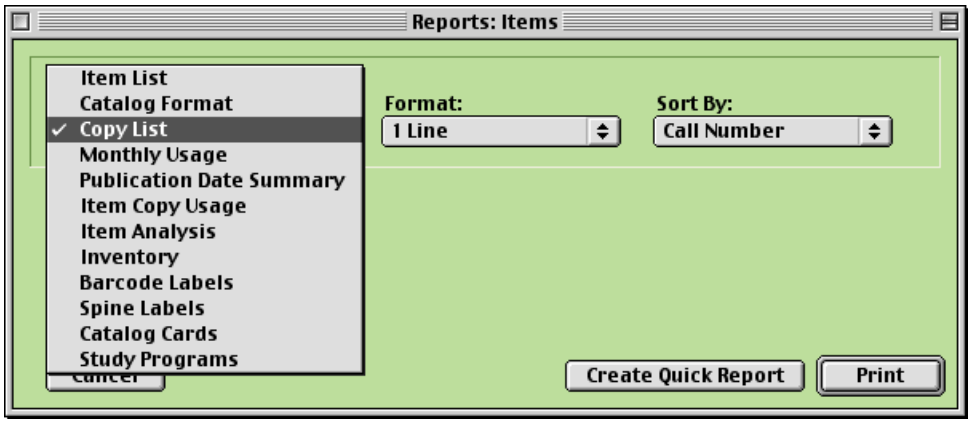
Step 1. Choose **Item Reports** from the **Reports** menu.

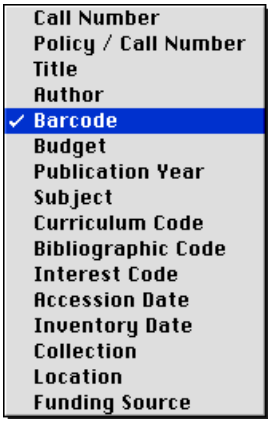


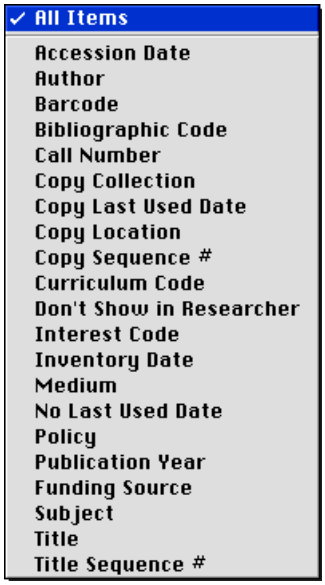


Step 2. Choose the type of report you want from the **Report Name** pull-down menu.

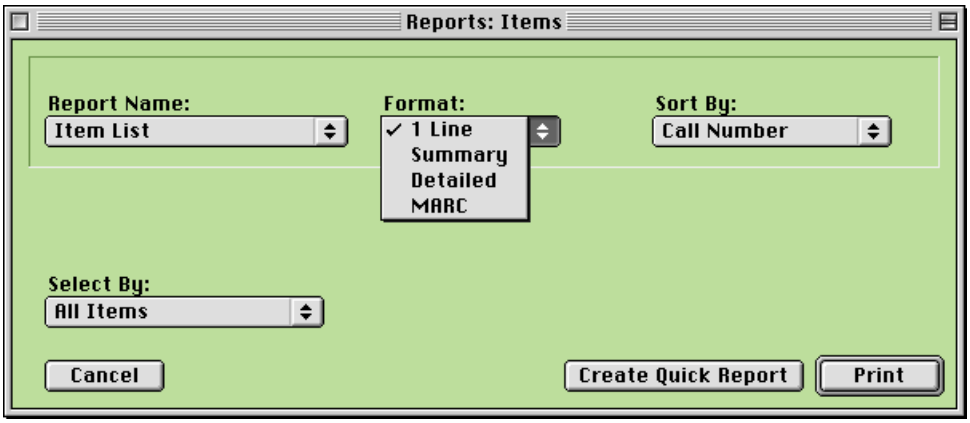




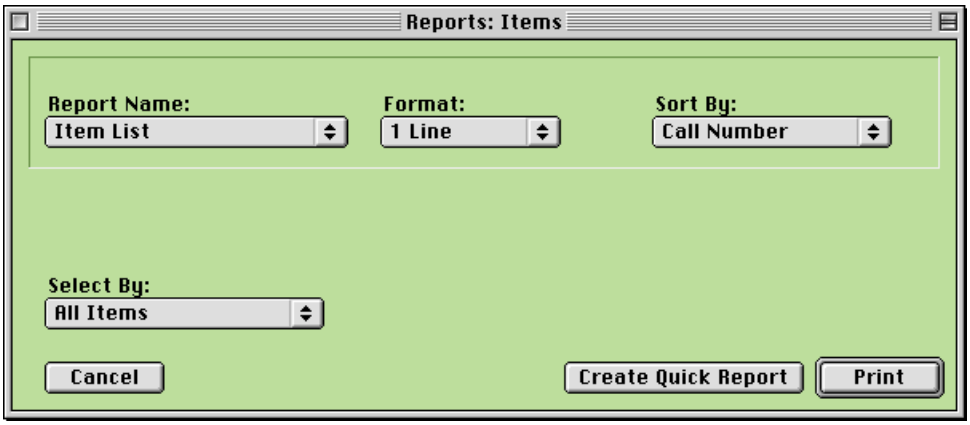




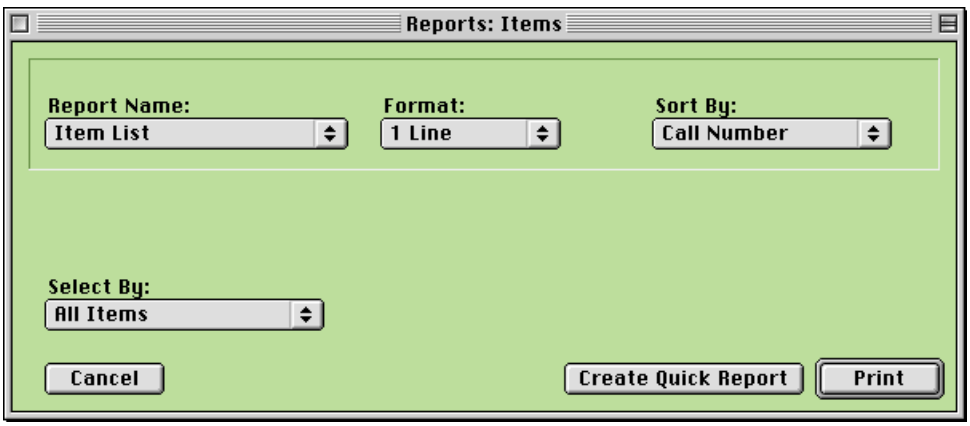
Step 3. Choose whether you want to have your report **Format** simple or detailed by selecting the desired display.



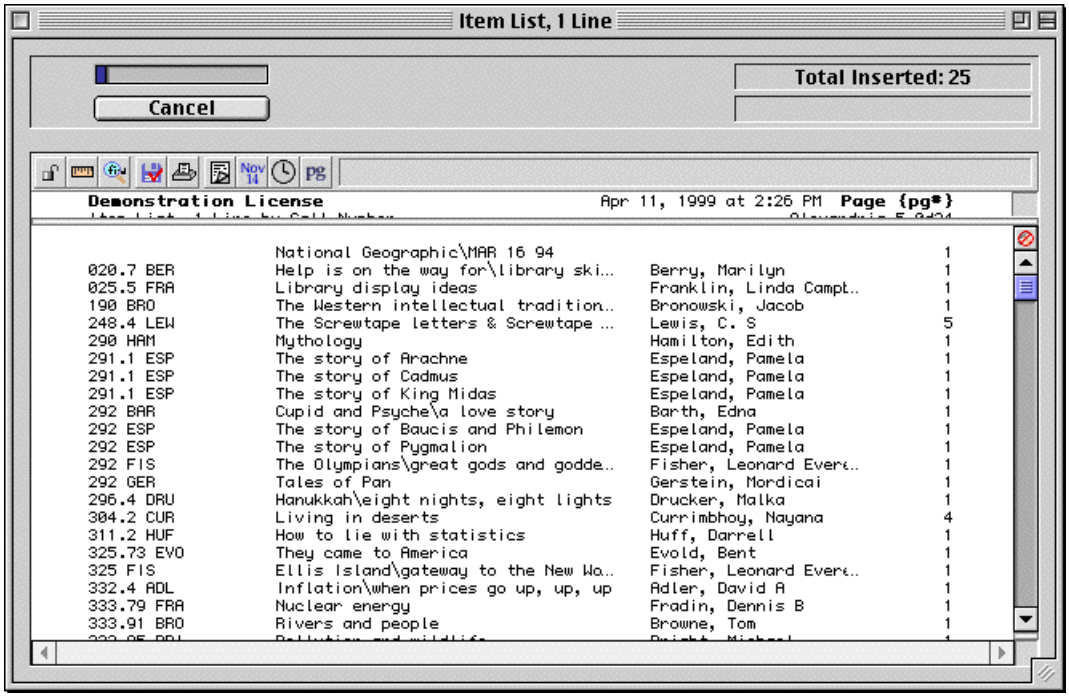
Step 4. Choose the order by which you want this report sorted under the **Sort By** pull-down menu.



Step 5. Use the **Select By** pull-down menu to select what item record information to include in this report.



Step 6. Click on the **Print** button to prepare the report. A window should appear similar to the one below, depending on your individual selection.


Item List, 1 Line
Cancel
Total Inserted: 25
Demonstration License
Apr 11, 1999 at 2:26 PM Page {pg#}
National Geographic\MAR 16 94 1
020.7 BER Help is on the way for\library ski... Berry, Marilyn 1
025.5 FRA Library display ideas Franklin, Linda Campt.. 1
190 BRO The Western intellectual tradition.. Bronowski, Jacob 1
248.4 LEW The Screwtape letters & Screwtape ... Lewis, C. S 5
290 HAM Mythology Hamilton, Edith 1
291.1 ESP The story of Arachne Espeland, Pamela 1
291.1 ESP The story of Cadmus Espeland, Pamela 1
291.1 ESP The story of King Midas Espeland, Pamela 1
292 BAR Cupid and Psyche\a love story Barth, Edna 1
292 ESP The story of Baucis and Philemon Espeland, Pamela 1
292 ESP The story of Pygmalion Espeland, Pamela 1
292 FIS The Olympians\great gods and godde.. Fisher, Leonard Evere.. 1
292 GER Tales of Pan Gerstein, Mordicai 1
296.4 DRU Hanukkah\eight nights, eight lights Drucker, Malka 1
304.2 CUR Living in deserts Currimbhoy, Nayana 4
311.2 HUF How to lie with statistics Huff, Darrell 1
325.73 EVO They came to America Evold, Bent 1
325 FIS Ellis Island\gateway to the New Wo.. Fisher, Leonard Evere.. 1
332.4 ADL Inflation\when prices go up, up, up Adler, David A 1
333.79 FRA Nuclear energy Fradin, Dennis B 1
333.91 BRO Rivers and people Browne, Tom 1

- ✓ Item List
- Catalog Format
- Copy List
- Monthly Usage
- Publication Date Summary
- Item Copy Usage
- Item Analysis
- Inventory
- Barcode Labels
- Spine Labels
- Catalog Cards
- Study Programs

Item Report Formats

This section describes each of Alexandria's Item report formats and demonstrates a sample of each. See the subsequent sections for Sort and Selection options.

- NOTE -

An Item is a generic term used in Alexandria to refer to either Title or Copy-based information. When dealing with reports, a more specific vocabulary is required. Item information consists of Title-based information such as Title, Author and Publisher. Copy-based information such as Barcode, Copy Number, and Call Number.

In general, Title-based reports have one report entry for each Title and Copy-based reports have one entry for each Copy.

However, if a report is sorted by an element which is repeated within the item, there will be a report entry for each repeated element. For example, a Title report sorted by Subject will have the same Title information listed under each Subject sort element. Simple, isn't it?

A Title-based report selected by Copy Data will only show titles and the specified copies. Copies for a Title that are outside the selected range are ignored. In the same way, a Copy report selected by Title information will select all the Copies for each selected Title.

Since Alexandria allows you to quickly prepare and view your reports, it's easy and fun to experiment with different options to prepare a varying range of powerful reports.

Item List—These reports are used to view Title information for the records in your collection.

1 Line—The report contains basic information about each selected Title. Use this report when minimal information is required.

Summary—A simple report compiled in a compact format with one or two titles per line. The report contains everything found in the 1-line report, but the information is easier to read. Use this report when minimal information is required.

Detailed—A report with full Title information, including each item's Call Number, Title, Author, Place of Publication, Publisher, Date of Publication, Sequence Number, LCCN, ISBN, Policy. Information for each copy, including Copy Number, Barcode Number, Accession Date, Vendor, Cost, and Location. Two or three item records can fit on each page. Use this report to verify data entry, or as a substitute to your card catalog.

Marc—A report showing each Title's Marc record in MicroLIF format.

Catalog Format—These Copy-based reports are formatted for creating patron catalogs usually used for audio visual materials.

1 Line—A summary title list in a column format. This report includes each Copy's Title and Barcode Number.

Titles—A single-line summary Title list in a three-column format that includes Title information only. Title, Publication, Year, Publisher, Extent, Summary, Series, Interest Codes, and Call Number.

Copies—A summary Title list in a three-column format that includes Title and the copy barcode number.

Copy List—These reports are used to display copy-specific information.

1-Line—A simple report with one line of information for each selected copy. The report includes each copy's Call Number, Title, Copy Number, Barcode Number, Life-to-Date Use, and Date of Last Use.

Simple, with Barcodes—A two-column report that includes each copy's Title and Call Number in the first column, and Author and Barcode Number in the second.

With Summary—A simple report that includes each copy's Call Number, Title, Copy Number, and Barcode Number. Under each title, this report also shows the item summary.

Detailed—A detailed report that includes the following information for each selected copy: Call Number, Title, Author, Copy Number, Barcode Number, Vendor, Cost, Purchase & Replacement, Collection, Funding, Location, and Accession Date. This report is similar to the Detailed Item List, but includes information for each copy of a title.

In Alexandria v3, if you run a **Copy List Detailed** report it will list the fund information (if you have it). In Alexandria v5, it does not.

Brief Bibliography—A simple report that includes Call Number, Title and Title Summary. This is a succinct version of the **With Summary** report.

Monthly Usage—Use these to prepare Monthly Usage reports on how often the selected Titles were used on a monthly basis.

1 Line—Prepares a summary report over the selected range of the title usage within the past 12 months. Use this report to get a summary of how often titles in this range are getting used. For example, if your management or administration is trying to decide where to spend additional funds for new items, you might prepare a report showing that certain areas of the collection are experiencing heavy usage and, therefore, should get further development funds.

Detailed—Prints all the statistical details for the prepared in the Monthly Usage Summary report. Where the summary report only prints the totals for the entire range, this report prints raw data for every title in the range.

Publication Date Summary—A report that includes the number of items published in each selected year, and the number of times items of each publication year have been checked out during the current year and life-to-date. Use this report to determine the age of the items in your collection.

Item Copy Usage—Reports on usage levels of individual copies in the collection. This can help determine how much each copy has been used.

Item Analysis—Counts the titles and copies within the selected range. Use this report to determine how many titles/copies you have within selected areas of your collection. It helps you answer questions like "How many fiction books do we have?" and "How many books in the 100's do we have?"

Inventory

These reports are used for inventory purposes. An inventory date range is generally required to run these reports. Items with an inventory date in the past month are considered "inventoried."

Inventoried Items—A report listing all items whose inventory date falls between a specified date range. The report includes each item's Call Number, Title, Barcode Number, Inventory Date, Transaction Status, and Funds.

Not Inventoried Items—A report of items that have not been inventoried within a specified date range. Every copy has an inventory date that specifies when it was last physically known to have been in the library. Performing inventory and checking in (or out) renews this date. For best results, be sure to enter today's date as the **Ending Date**. You *can* generate reports for any given date range, but keep in mind that items have only one (most recent) inventory date. Therefore, if an item that was missing three months ago has recently been found, it will not appear as missing in any reports you generate for that time period. This report includes each item's Call Number, Title, Barcode Number, Inventory Date, Transaction Status, and Funds.

Lost Items Inventoried—A report listing all items within a specified inventory date range (that is, checked out to Patron #1). If the item was inventoried, it should be somewhere in the library.

Inventory Statistics Summary—All items within the selected range are counted, and a single page report specifies how many items have been inventoried, how many have not, and how many lost items have been located. Use this report to determine your current inventory status.

Barcode Labels—This prints a barcode label for each selected item. You can only print barcode labels for items already in your collection. To print barcode labels for temporary items, select **Special Reports** under the **Reports** menu. Other information on the label includes the item's Title, Barcode Number and Call Number. This report is designed for Sheet Feed Printers. Use **COMPanion's V0055 Laser Labels** for perfect results. If you want to print more than one barcode label at a time, enter the number you want in the **Number of Duplicates** field. If you want the labels to start printing in a location other than the top left of the sheet, check Skip Some Labels.

Spine Labels—These reports are designed for sheet feed printers. Paper stock for these forms can be purchased from COMPanion. More than one spine label can be printed at a time; enter the number you want in the **Number of Duplicates** field. If you want to print more than one barcode label at a time, enter the number you want in the **Number of Duplicates** field. If you want the labels to start printing in a location other than the top left of the sheet, check Skip Some Labels.

Spine Only, Left—Spine labels with the label text left justified.

Spine Only, Centered—Spine labels with the label text center justified.

Envelope and Spine, Left—Combination Envelope and Spine labels with the text left justified. Barcodes will only appear on the Spine label.

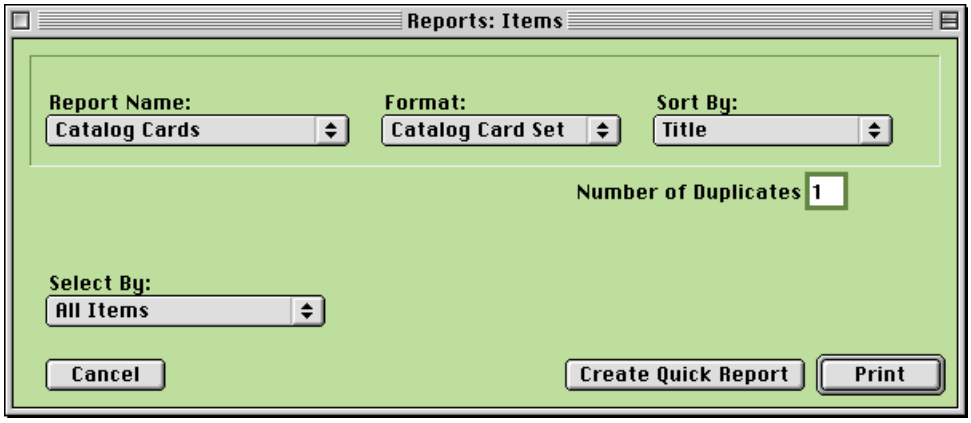
Envelope and Spine, Centered—Combination Envelope and Spine labels with the text center justified. Barcodes will only appear on the Spine label.

LOC Style Spine Labels—These labels insert carriage returns between the Call Number prefix, major classification, subclassification, cutter and publication date and copy number.

Normal Size—Prints to standard spine label stock.

Barcode Label Size—Prints barcode labels in a landscape orientation.

Catalog Cards—Catalog card printing requires "sheet-feed" printers such as Laser and Inkjet printers. Paper stock for these forms can be purchased from COMPanion. More than one catalog card can be printed at a time; enter the number you want in the **Number of Duplicates** field.



Catalog Card Set—Prints Title, Author, Subject, Series, and Shelf List cards for each title selected.

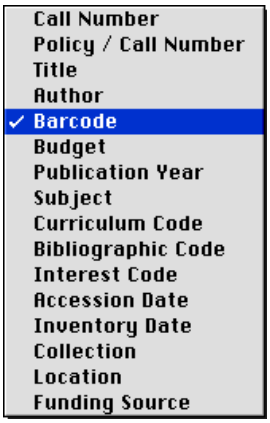
Title Card—Only prints the Title Card for the specified titles.

Author Card—Only prints the Author Cards for the specified titles. A separate card will be printed for each name entered into the Author field.

Subject Card—Only prints the Subject Cards for the specified titles. A separate card will be printed for each subject listing.

Series Card—Only prints the Series Card for the specified titles. If there is no data in the Series field, no card will be printed.

Shelf List Card—Only prints the Shelf List Card for the specified titles. If there are several copies of the title, additional cards will automatically be printed.



Sorting Options for Item Reports

Use the **Sort by** pull-down menu to select the order in which you want the items included in your report. For example, if you want an alphabetic list, sort by title.

The following is a list of **Sort by** values for item reports.

Call Number—This selection sorts by Call Number, then Primary Author, then Title. Call Number sorts from left to right, so a Call Number of 100 is sorted before 20. To ensure numerical sorting works for you, all numbers must have leading zeros. For example, a Call Number of 020 is sorted before 100.

Policy—This report is sorted alphabetically by Policy Name, and within each policy by Call Number. Each Policy begins on a new page.

Title—This report is sorted alphabetically by Title. Articles such as 'A', 'An' or 'The' are ignored when specified as such in the Marc record. For example, *The Wizard of Oz* will be sorted under W.

Author—This report is sorted alphabetically. To ensure that the Author names sort correctly, make sure all Author names are entered using the same format: "Last Name, First Name." If a Title has more than one Author, it will appear under each Authors listing.

Barcode—This report is sorted numerically by Barcode.

Publication Year—This report is sorted numerically by the publication year field on the title record. This is useful if you want to compile a list of when items in the collection were published.

Subject—Sort by Subject and then by Call Number.

Curriculum Code—Sort by Curriculum Code and then by Call Number.

Bibliographic Code—Sort by Bibliographic Code and then by Call Number.

Interest Code—Sort by Interest Code and then by Call Number.

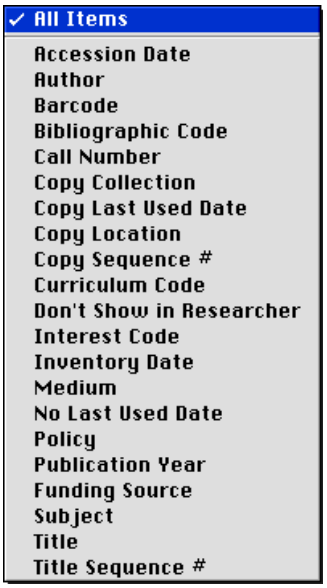
Accession Date—Sort by Accession Date and then by Call Number.

Inventory Date—Sort by Inventory Date and then by Call Number.

Collection—Sort by Copy Collection Code and then by Call Number. Each Copy Collection Code starts on a new page.

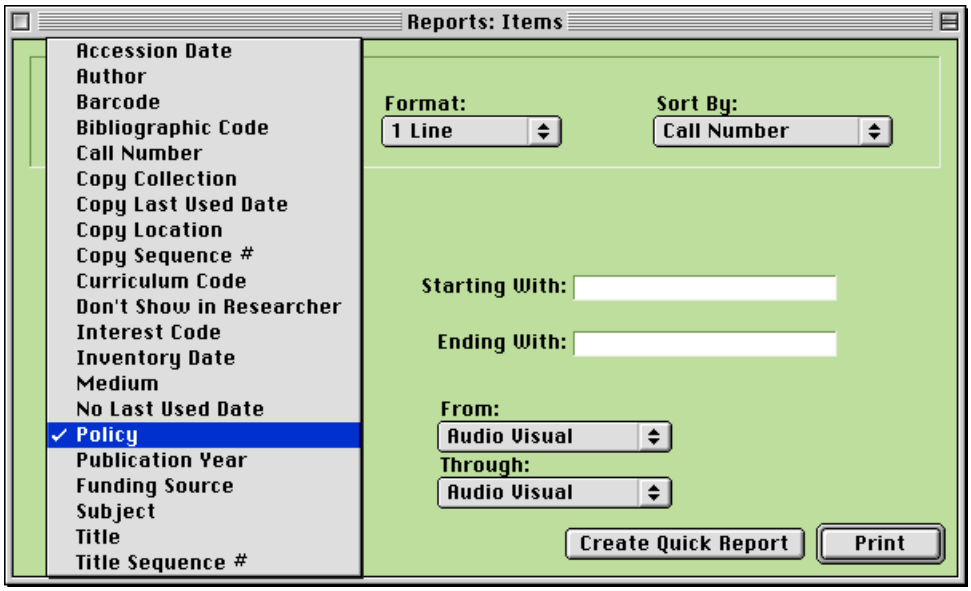
Sublocation—Sort by Copy Sublocation Code and then by Call Number. Each Copy SubLocation Code starts on a new page.

Funds—Sort by Copy Fund code and then by Call Number. Each Copy fund code begins on a new page (note: this field can be customized in your **Item Management** preferences. For this example, the Funding Source will be called "**`Funds`**").



Selection Options for Item Reports

Use the selection pull-down menus to select which items you want to include in the report. For example, you can select items in a certain Barcode or Call Number range.



You can enter up to six values for selection criteria using **AND**, **OR**, and **AND NOT** (Boolean Logic). When you choose values in the selection pull-down menus, other selections appear and prompt you for **Starting With** and **Ending With** values.

The following is a list of selectable values for item reports:

All Items—The report includes all items.

Accession Date—This report includes copies added to your system in the date range you specify.

Author—This report includes items with Authors in the alphabetic range you specify.

Barcode Range—This report includes copies in the Barcode range you specify.

Barcode List—This report includes all Items matching the barcode you enter or scan. You can select all the barcodes in it later with another report.

Bibliographic Code—This report includes items classified under the bibliographic copy codes you specify.

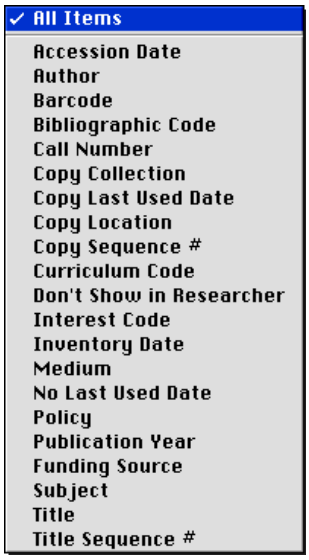
Call Number—This report covers copies within the Call Number range you specify. Call numbers are ordered from left to right, so 100 comes before 20, but 020 comes before 100.

Copy Last Used Date—This option selects copies which have been used over the specified date range.

Copy Collection—This report includes items classified within the Collection you specify.

Copy Policy—This includes copies within the policy range you specify.

Copy Sequence #—This report includes copies with sequence numbers within your specified range. Copies are assigned a sequence number in the order that they are entered into the system.



Copy Status—This allows you to limit the report to items that are unavailable, lost, discarded, checked out, on reserve, or on in-stock hold.

Copy Location—This report includes items classified with the Location you specify.

Curriculum Code—This report includes items classified with the Curriculum keywords you specify.

Don't Show in Researcher—This option allows you to select items based on the status of the **Don't Show in Alexandria Researcher** check-box. You can select either the hidden or visible items.

Medium—This report includes items classified with the Medium code you specify.

Interest Code—This report includes items classified with the Interest Level or Reading Level you specify.

Item Call Number—This report includes items with the title call number you specify.

Inventory Date—This report includes copies inventoried during the date range you specify.

Last Used Date—This report selects copies that have never circulated.

Policy—This report includes items within the policy code range you specify.

Publication Year—Selects items with publication years between any given range. Publication years must be specified by a four digit number such as `1979` or `2002`.

Publisher—Selects items with Publishers in the given range.

Funds—This report includes items with the Copy Funds code you specify.

Series—Selects items with Series in the given range.

Subject—This report includes items classified with the subjects you specify.

Title—This report includes titles within an alphabetical title range you specify.

Title Sequence Number—This report includes items with sequence numbers between the range you specify. Titles are assigned a sequence number in the order they are entered into the system.

Circulation Reports

Preparing Circulation Reports

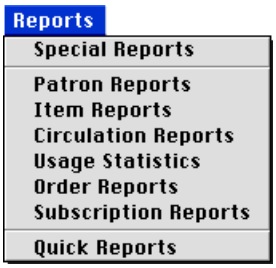
Circulation reports gather information from Alexandria's transactions and statistics records and presents it in a number of different formats. The reports are grouped into two categories.

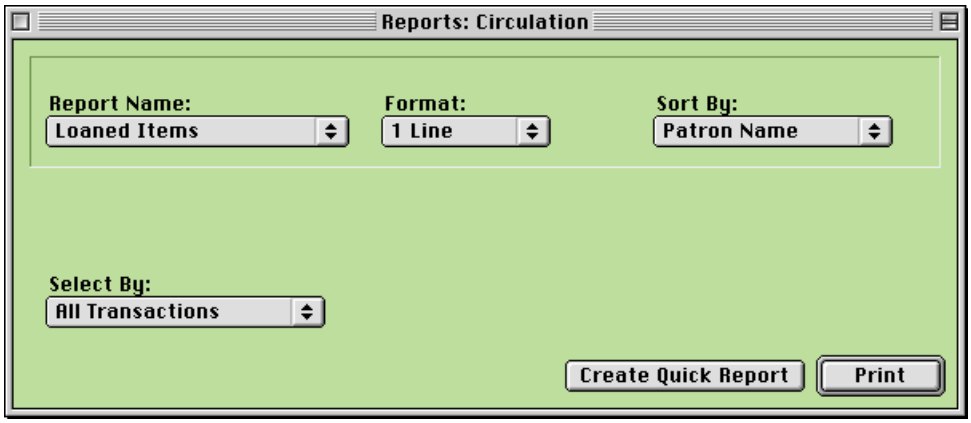
Circulation Reports—Reports based on Circulation information. You can get lists of Loaned Items, Overdue Items, Fines, Requests, Reservations, Lost Items, and much more. In Alexandria terminology, Circulation Lists are designed for use by the Librarian and Circulation Notices are designed for distribution to Patrons.

Usage Statistics—Reports on the usage of the library. This report will show when the library is getting used. It reports by Hour, Day of the Week, or by Month. You can discover who is using the library and when they are using it. You can find out how close to due dates that people return items and other statistical information during a specified date range.

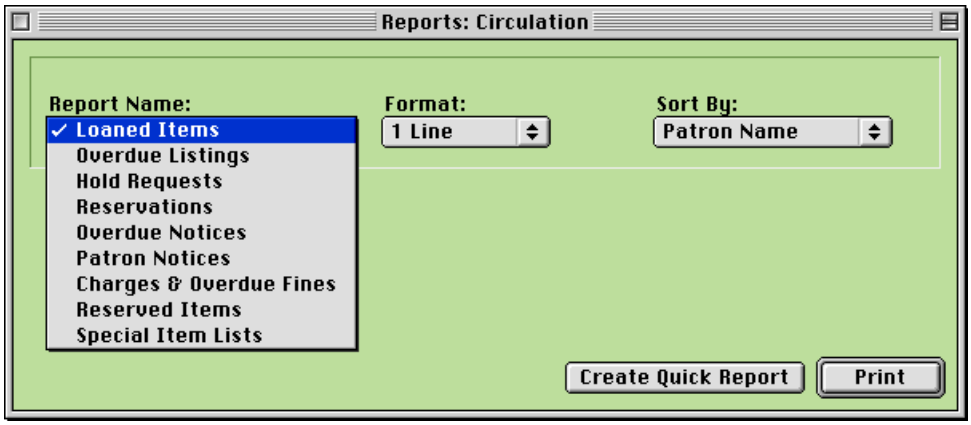
To prepare Circulation Reports, follow these steps:

Step 1. Choose **Circulation Reports** from the **Reports** menu.

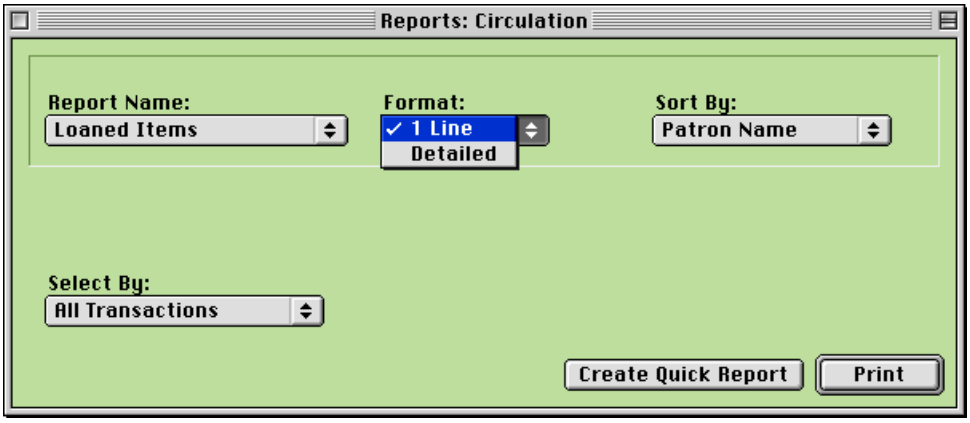




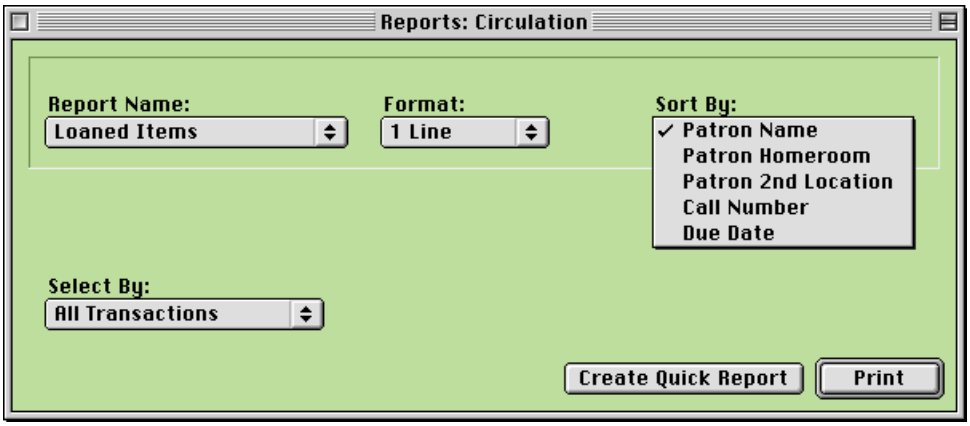
Step 2. Choose the type of report you want from the **Report Name** pull-down menu.



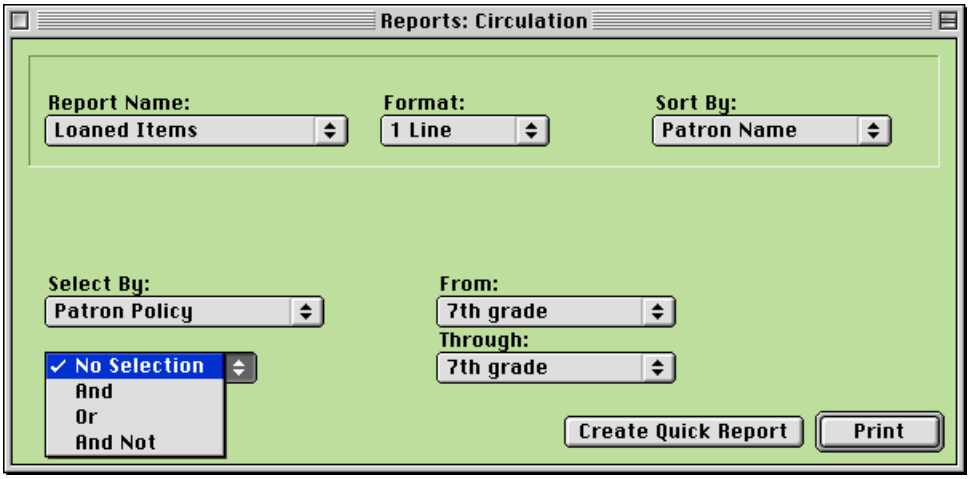
Step 3. Choose how you want your report **Format** displayed.



Step 4. Choose the **Sort By** order for this report.



Step 5. Use the **Select By** pull-down menu to select which Patron Records to include in the report.



Step 6. Click the **Print** button to prepare the report.

Circulation Report Formats

The following is a list of Alexandria's Circulation reports.

Loaned Items—These reports prepare lists for library use. Only loaned items are included in the report. Items loaned to special or inactive patrons (Barcode #'s between 1 and 50) or inactive patrons are not included in these reports.

1 Line—Includes primary transaction information for each loaned item. The report includes each patron's Name and Barcode, and each item's Title, Call Number, Barcode and Due Date. An asterix indicates overdue items.

1 Line Landscape—This report is the same as the 1 Line report, but is in a landscape format. This allows more room for displaying the title.

Detailed—Includes full transaction information for each loaned item. All available information is included in this report.

Overdue Listings—These reports prepare lists for library use. Only overdue items are included in the report. Items loaned to special patrons (barcode #'s between 1 and 50) or inactive patrons are not included in these reports.

This report includes an implicit selection of any overdue item. If you use a selection that uses the Due Date, that selection will be used rather than the implicit values.

1 Line—Includes primary transaction information for each patron with overdue items. It displays the patron's Name, Barcode and Phone Number along with the number of Overdue Items, those currently checked out and the patron's Current Fine Balance.

Detailed—Includes full transaction information for each overdue item. All available information is included. This report includes each patron's Name and Barcode Number, Phone Number, each item's Title, Barcode Number, Call Number, Cost, Due Date, and the number of days the item is overdue.

Posting List—Includes Name, Number of Overdue items and Charges Due. This report can be posted in the library to inform patrons that have overdue items and charges.

Hold Requests—These reports prepare hold request and in-stock hold lists.

Pending Hold—Only includes Hold Requests which are currently pending. For Pending Holds, the Request Date is the date on which the hold was placed. The Expiration Date is the date the request expires. Alexandria automatically removes Expired Hold Requests at the beginning of each day.

In-Stock—A report that lists selected items being held for patrons. Only in-stock requests are selected. For In-Stock requests, the In-stock Date is the date on which the item first became available for a patron. The Expiration Date is the date on which the request expires. Alexandria automatically removes Expired Requests at the beginning of each day.

Reservations—This report prepares reservation lists.

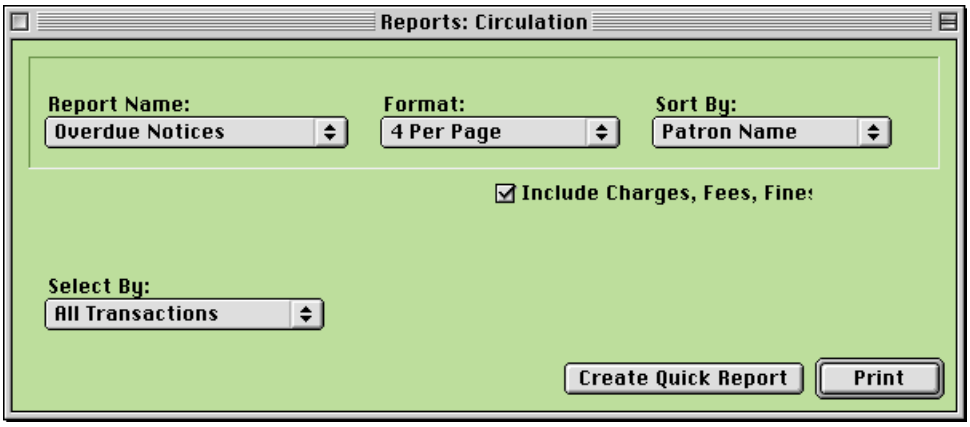
For Reservations, the Request Date is the date on which the reservation was placed and the Reservation Begin Date is the date on which the reservation begins. For a listing of the reservations scheduled for today, select this report and **Select by** a **Reservation Begin Date** of today's date.

1 Line—Prepares a tabular report with all Reservation information.

Labels—Prepares "`Reservation Labels`" using the Label stock provided by COMPanion. Includes Reservation Dates, Item Barcode, Title, and patron's Name and Address.

Overdue Notices—These notices are sent to patrons to inform them that they have overdue items and should return them to the library. You can change the text of these notices using the **Letters** preference.

Overdue notices are generated for all overdue items unless you limit them by selecting a range of due dates. For example, you can set the date range to generate overdue notices only for items overdue by more than a week.



If you select **Include Charges, Fees, Fines** then Charges, Fees and Fines are included in the reports. Otherwise, they are ignored.

The following are the formats for overdue notices:

4 per Page—Overdue slips printed 4 per page. One slip is printed for each overdue item or charge. This is a good format to use when each patron has only 1 or 2 overdue items. The slip includes the patron's Name, Barcode Number, Location, Level, Sublocation, Government ID, Library Balance, and the item's Title, Barcode Number, Author, Call Number, Replacement Cost, Due Date, Return Date, Daily Fine/Fee Rate, and Fine Balance for each item.

2 per Page—Overdue slips printed 2 per page. One slip is printed for each patron with an overdue item. Up to 4 items can be included on each slip. If patrons have several overdue items, this format is preferable over the 4 per page format—as it saves paper. The slip includes the patron's Name, Barcode Number, Location, Sublocation, Government ID, Level, Policy, and Library Balance, and the item's Title, Barcode Number, Call Number, Date, Fine/Fee amount by item, amount paid by item, fine/fee balance by item, and Replacement Cost. It also includes the total number of items the patron has overdue and the fine/fee amount due on the slip.

Self Mailer—An overdue notice in letter format designed to be folded and mailed without an envelope. If there are several overdue items, the letter runs onto a second page. The letter includes the patron's Name, Address, Location, and Barcode Number, and each item's title, Barcode Number, Due Date, Return Date, number of fine/fee days calculated, fine/fee rate, total balance by item and Replacement Cost. This format is excellent if notices are mailed. Just fold, staple and stamp—the return and patron addresses are automatically printed on the mailer.

Overdue Letters with Summary—An overdue notice in letter format. This letter includes all items a patron has overdue. If there are several overdue items, the letter runs onto a second page. The letter includes the patron's Name, Address, Barcode Number, and each item's Title, Author, Barcode Number, Call Number, Due Date, Return Date, Daily Fine/Fee rate, the number of fine/fee

days totaled, the total balance due by item, and the total balance due for all items. After the last letter, a Summary is displayed.

Overdue Letters—Same as the previous report, but without the Summary page at the end.

Overdue Letters to Parents—Same as the previous report, but is addressed "`To the Parents or Guardian of`" rather than the actual Patron.

Email—An overdue notice sent to the patron using the Email address in the patron record. A summary report is prepared so you have record of which patrons were sent Email notification.

NOTE:
You must have your Email preferences correctly configured for this to work.

Patron Notices—These include the following notices. You can change the text of these notices using the **Letters** preference *(see "Letters" on page 78)*

Hold In-Stock—Notice sent to a patron to inform them that a book they have on hold is available in the library.

Recall Letters—Notice sent to a patron, asking that they return a book they have checked out.

Charges and Overdue Fines—Reports which include both fines and overdue records with fines. Within specified ranges, only fines and other charges will be printed. Use these reports to see who owes the library money. Only Circulation records where an actual fine is due are included. Thus, an overdue item with no fine is not included.

Standard—Displays transactions for currently overdue items and unpaid fines/charges issued against a patron.

Charges Only—Only displays transactions where a charge is due (charges are fees that have reached their maximum limit and are no longer accruing). Does not include fines for currently overdue items.

Fines Only—Only displays transactions where a fine is due (fines are fees that are still accruing). Does not include other charges, such as previously overdue items.

Reserved Items—Prints a list of reserved items. These are the items checked out using the "`J`" circulation command.

Special Item Lists—These reports are designed to show items with special status codes.

Lost Items—All items which are considered Lost. This includes items checked out to Patron barcode #1 and all items lost by real patrons.

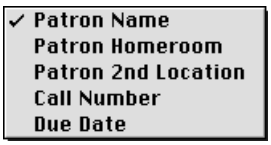
Discarded Items—All items which are checked out to Patron barcode #2.

Library Use Items—All items which are checked out to Patron barcode #3.

On Repair Items—All items which are checked out to Patron barcode #4.

On Order Items—All items which are checked out to Patron barcode #5.

Archived Items—All items which are checked out to Patron barcode #6.



Circulation Reports Sorting Options

Use the **Sort by** pull-down menu to select the order which you want the items listed in your report.

The following is a list of **Sort by** values for Circulation reports.

Patron Name—Report sorted alphabetically by the patron's name.

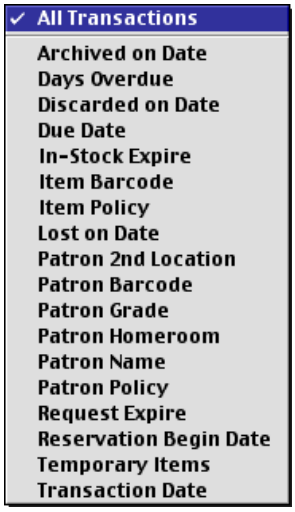
Patron Location[1]**—**This report is sorted alphabetically by Location, and within each location by patron name. Each location begins on a separate page. This makes it easy to distribute reports to different locations.

Patron Sublocation[2]**—**This report is sorted alphabetically by Sublocation, and within each location by patron name. Each Sublocation begins on a separate page. This makes it easy to distribute reports to different Sublocations.

Call Number—Report sorted in Call Number order. This sorting order makes it easy to use the report to search the library for returned items that haven't been recorded as returned by Alexandria.

Due Date—This report is sorted by Due Date then by Patron Name. This sorting order makes it easy to find transactions in due-date-order.

1. The name for Location is customized in Preferences. Your customized name will appear.
2. The name for Sublocation is customized in Preferences. Your customized name will appear.



Circulation Reports Selection Options

Use the selection pull-down menu to specify which transactions should be examined for inclusion into the report. Each circulation report has its own selection filter, but by specifying additional selection options, you can further restrict the number of records examined and displayed for your report.

For example, the Loaned Items report only includes loaned items, but you can further restrict the report to only include loaned items from a specific location using the selection pull-down menus.

You can enter up to six values for selection criteria using **AND**, **OR**, and **AND NOT** (Boolean Logic). When you choose values in the selection pull-down menus, other fields appear, asking you for **Starting With** and **Ending With** values.

The following is a list of selection values for Circulation reports:

All Transactions—All transactions are examined using the selection criteria for each report format.

Transaction Date—This report includes transactions performed during a transaction date range you specify. The Transaction Date is the date on which the transaction was performed. If you enter only a **Starting With** Date, Alexandria will assume an **Ending With** date is the "far future." If you enter only an **Ending With** value, the **Starting With** value is assumed to be in the very "far past."

Due Date—This report includes transactions that have a due date within a Date range you specify. A due date has different meanings depending on the type of transaction involved.

- For an item checked out, the due date is the date an item is due back to the library.
- For a hold request, the due date is the date on which the request expires.
- For a reservation, the due date is the date a reservation begins.

If you enter **only** a **Starting with** Date, Alexandria will assume an **Ending with** date in the "far future." If you enter only an **Ending with** value the **Starting with** value is assumed to be in the "far past."

Days Overdue—This report includes transactions with Due Dates computed between the **Starting With** and **Ending With** ranges of days overdue. If you enter only a **Starting with** selection, Alexandria will assume a "very large" ending value. If you enter only an **Ending With** value, the **Starting With** value is assumed to be zero. For example, to select items which are at least seven days overdue, enter `"7"` in the **Starting With** field. To find items that are seven or fewer days overdue enter an **Ending With** value of `"7"`. To locate items that are due in the next seven days, enter a **Starting With** value of `"-7"` and an **Ending With** value of `"0"`. The results of this selection are exactly the same as if you put dates into the **Due Date** selection criteria.

Temporary Items—This report only includes transactions for temporary items. Because Reservations and Hold Requests cannot be performed on temporary items, this option should not be used for those reports.

Homeroom[1]**—**This report only includes transactions for patrons in the locations you specify. Typically, this is used for preparing overdue listings for a group of patrons in a specified Homeroom. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the Homeroom begins with the entered text.

1. The name for Homeroom is customized in preferences. Your customized name will appear here.

Patron Policy—This report includes transactions for a specified range of Patron Policies.

Grade[1]**—**This report only includes items with patron levels within the range you specify. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the Level begins with the entered text.

2nd Location[2]**—**This report only includes transactions for patrons in the SubLocations you specify. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the SubLocation begins with the entered text.

Patron Name—This report includes transactions for a specified range of Patron Names. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the name matches the entered text.

Patron Barcode—This report includes transactions for a specified range of Patron Barcodes. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the barcode matches the entered text.

Item Barcode—This report includes transactions for a specified range of Item Barcodes.

Item Policy—This report includes transactions for a specified range of Patron Policies. If you enter only a **Starting with** (or **Ending with**) selection, Alexandria will select all records where the Policy name matches the entered text.

Reservation Begin Date—This report only includes reservations that start during a date range you specify. If you enter only a **Starting with** Date, Alexandria will assume an **Ending with** date in the "far future." If you enter only an **Ending with** value, the **Starting with** value is assumed to be in the very "far past."

Request Expire—This report only includes Hold requests that expire during a date range you specify. If you enter only a **Starting with** Date, Alexandria will assume an **Ending with** date in the "far future." If you enter only an **Ending with** value the **Starting with** value will be assumed to be in the very "far past."

In-Stock Expire—This report only includes in-stock holds that expire in the date range you specify. If you enter only a **Starting with** Date, Alexandria will assume an **Ending with** date in the "far future." If you enter only an **Ending with** value the **Starting with** value will be assumed to be in the very "far past."

Discarded on Date—This report only includes items discarded during a date range you specify. If you enter only a **Starting with** Date, Alexandria will assume an **Ending with** date in the "far future." If you enter only an **Ending with** value the **Starting with** value will be assumed to be in the very "far past."

Lost on Date—This report only includes items lost during a date range you specify. If you enter only a **Starting with** Date, Alexandria will assume an **Ending with** date in the "far future." If you enter only an **Ending with** value the **Starting with** value will be assumed to be in the very "far past."

Archived on Date—This report only includes items Archived during a date range you specify. If you enter only a **Starting with** Date, Alexandria will assume a **Ending with** date in the "far future." If you enter only an **Ending with** value the **Starting with** value will be assumed to be in the very "far past."

1. The term used for Grade is customized in Preferences. Your custom term will appear here.
2. The term used for 2nd Location is customized in Preferences. Your custom term will appear here.

Preparing Usage Statistics Reports

Usage Statistics give you insight on how your library is being used, return rates, usage by item, and patron policies. Time and group-based statistical reports can be created.

Of course, no single library will use *all* these reports, so experiment with your many choices to determine which reports are applicable to your library.

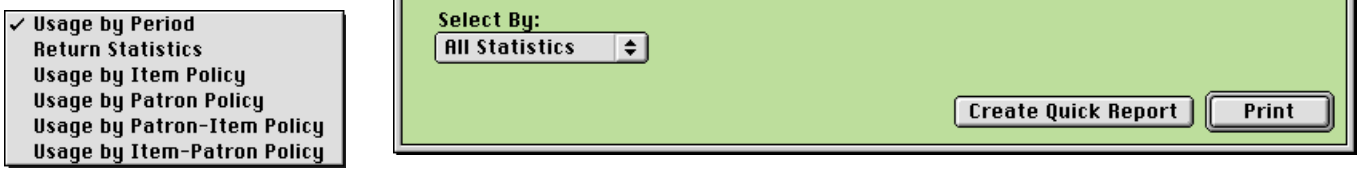
During circulation, statistics are collected on an hourly basis for each patron/item transaction that occurs. Therefore, there may be thousands of statistical records saved for your library. For example, when a patron of type STU checks out a book of type HBF during the 10th hour of June 1, 2002, a statistics record is created. If more STU patrons check out more HBF books during this hour, the statistic counts are updated. Also, if a FAC patron checks out a book, additional statistical records are created for this policy.

Therefore, not only are statistic records time-based, but they can provide information on which patron groups are using the library, and which item groups are getting used. For example, using these reports, you can see which patron groups are checking out which item groups. These types of statistics can answer questions that would be very difficult to determine without computers.

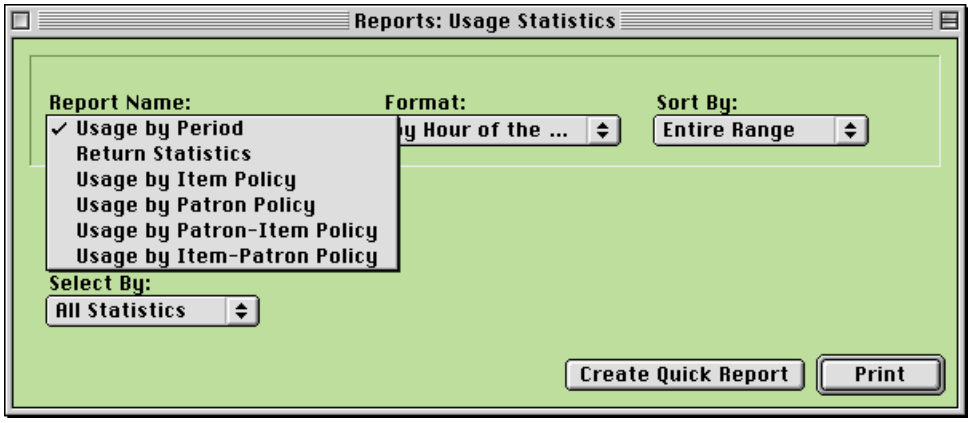
Many statistics reports are available. After using Alexandria for a few months, you might gain some interesting insights into the operation of your library by examining these reports.

To prepare Usage Statistics Reports follow these steps.

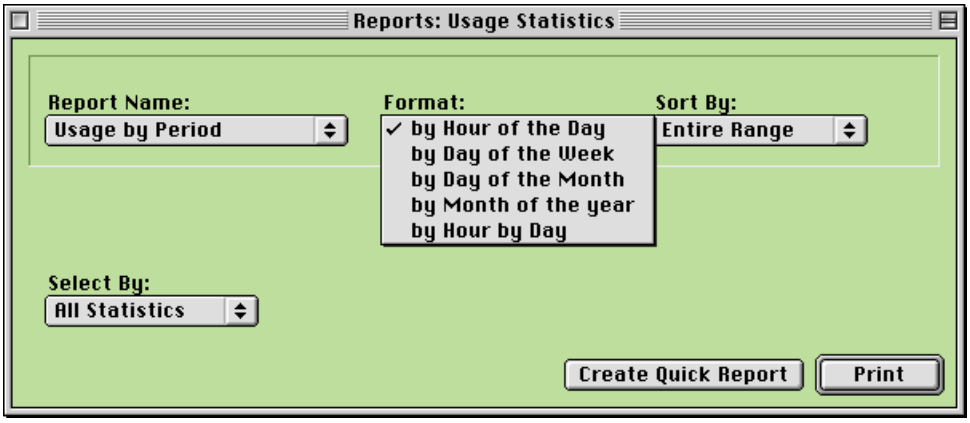
Step 1. Choose **Usage Statistics** from the **Reports** menu.



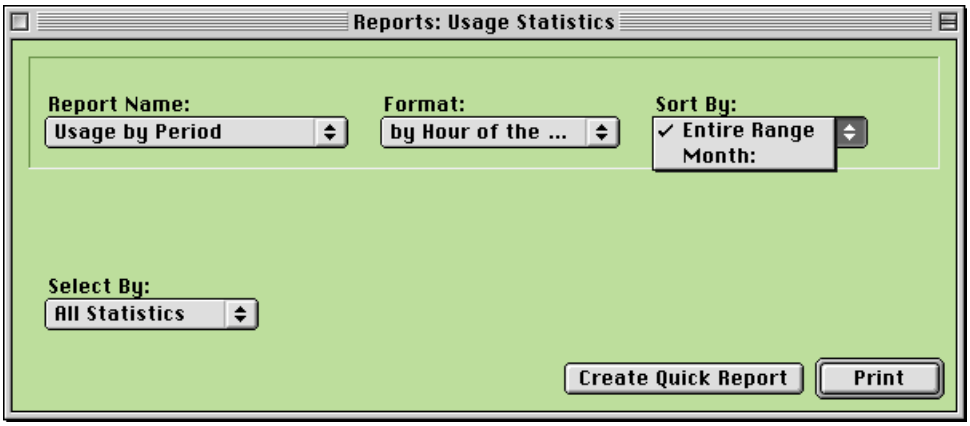
Step 2. Choose the type of report you want from the **Report Name** pull-down menu.



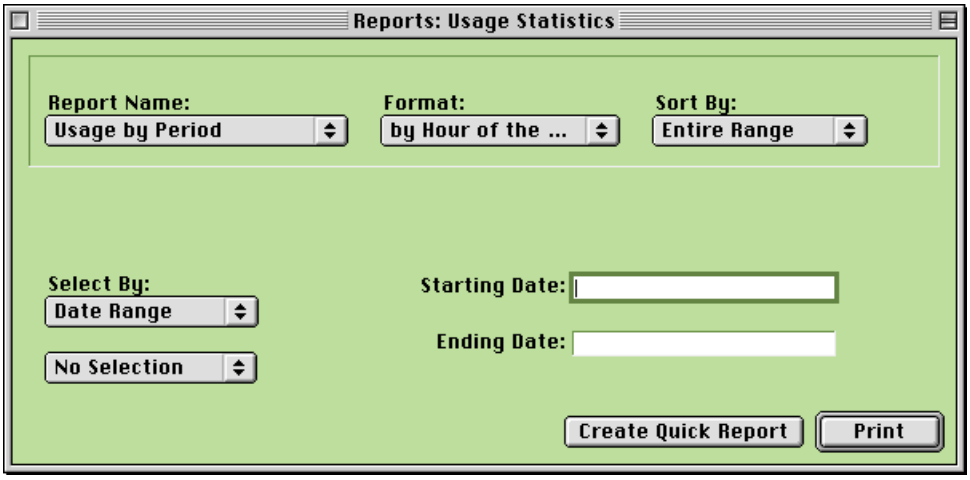
Step 3. Choose how you want your report **Format** displayed.



Step 4. Choose the **Sort By** order.



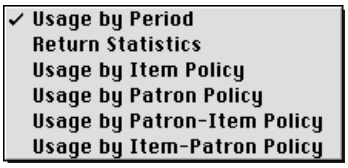
Step 5. Use the **Select By** pull-down menu to select which records to include in this report.



Step 6. Click the **Print** button to prepare the report.

Usage Statistics Report Formats

Usage by Period—Allows the librarian to examine library usage over different time periods. Use these reports to answer questions, such as: "How busy are we during certain hours of the day?"; "Which days of the week have the most activity?"; "Are some days of the month busier than others?"



by Hour of the Day—Provides statistics on transactions during certain hours of the day. Use this report to determine what hours of the day are the busiest for your library.

by Day of the Week—Provides statistics on transactions during specific days of the week. Use this report to determine which days of the week are the busiest for your library.

by Day of the Month—Provides statistics on transactions during specific days of the month. Use this report to determine which days of the month are the busiest for your library.

by Month of the Year—Provides statistics on transactions during specific months of the year. Use this report to determine which months of the year are the busiest for your library.

by Hour by Day—Prints a grid with hours down the left side and days of the week across the top, displaying usage in every cell. Use this report to determine which hours of the day are busiest on which days of the week.

Return Statistics—Prints a summary report on how close to the due date items are returned. A negative number indicates that items are returned before the due date, a positive number indicates that items are returned after the due date. This information can be used to help determine if your library's loan period matches the actual return rate of your patrons.

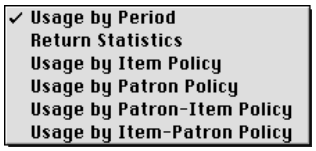
Usage by Item Policy—Allows the librarian to see if items with a specific policy are used during different periods.

by Day of Week—Prints a grid with item policies down the left side and days of the week across the top. Library usage is printed in each cell. Use this report to determine which item groups are being used in the library on which days of the week. This information can be used for budgeting, staffing and other uses.

by Month—Prints a grid with item policies down the left side and months of the year across the top. Library usage is printed in each cell. Use this report to determine which item groups are being used in the library during which months of the year. This information can be used for budgeting, staffing and other uses.

by Patron Policy—For each item policy, patron policies are listed along with the types of activities performed. Use this report to determine which patrons are using which items in the library.

Usage by Patron Policy—Allows the librarian to see if patrons with a particular policy are used during different periods.



by Day of Week—Prints a grid with patron policies down the left side and days of the week across the top. Library usage is printed in each cell. Use this report to determine which patron groups are using the library on which days of the week. This information can be used for budgeting, staffing and other uses.

by Month—Prints a grid with patron policies down the left side and months of the year across the top. Library usage is printed in each cell. Use this report to determine which patron groups are using the library during which months of the year. This information can be used for budgeting, staffing and other uses.

by Item Policy—Use this report to determine which patrons are using which items in the library.

Usage by Patron-Item Policy—Allows the librarian to examine combinations of Patron and Item policies.

by Day—Prints a grid with patron/item policy pairs down the left side and days of the week across the top. Library usage is printed in each cell. Use this report to determine which combination groups are being used in the library on which days of the week.

by Month—Prints a grid with patron/item policies down the left side and months of the year across the top. Library usage is printed in each cell. Use this report to determine which combination groups are using the library during which months of the year.

Usage by Item-Patron Policy—Allows the librarian to examine combinations of Item and Patron policies.

by Day—Prints a grid with item/patron policies down the left side and days of the week across the top. Library usage is printed in each cell. Use this report to determine which item/patron groups are being used in the library on which days of the week.

by Month—Prints a grid with item/patron policies down the left side and months of the year across the top. Library usage is printed in each cell. Use this report to determine which groups are being used in the library during which months of the year.

Usage Statistics Sorting Options

Typically, the subtotals returned by the reports are what you might expect; however, if you want further monthly subtotals (providing the date range spans more than one month), select a the **Sort by** option **By Month**, or else select the **Entire Range** option.

Usage Statistics Selection Options

You can instruct Alexandria to prepare reports using **All Statistics** or only statistics over a specified **Date Range** by using the **Select by** selections.

Order Reports

These reports print information from the Order, Vendor and Budget management windows. Reports exist in the following categories:

Order Reports—Contains report options for Orders, Vendors and Budgets.

Order List—Provides order information in various formats. Also prints claim letters and other management reports.

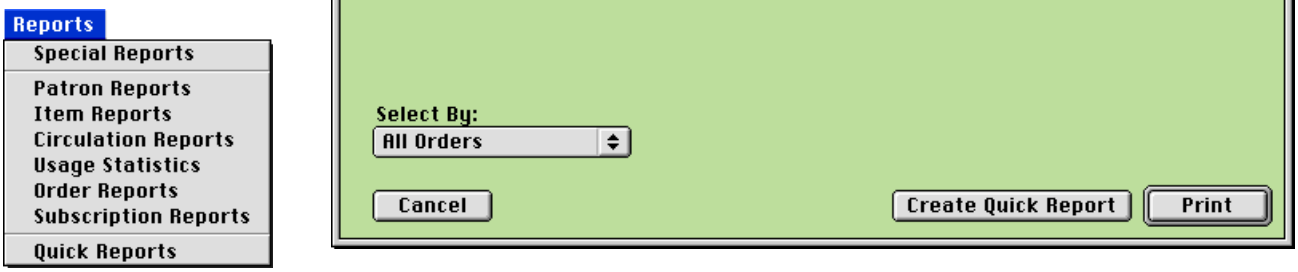
Vendor List—Provides Vendor information in various formats.

Budget List—Lists budget information in various formats.

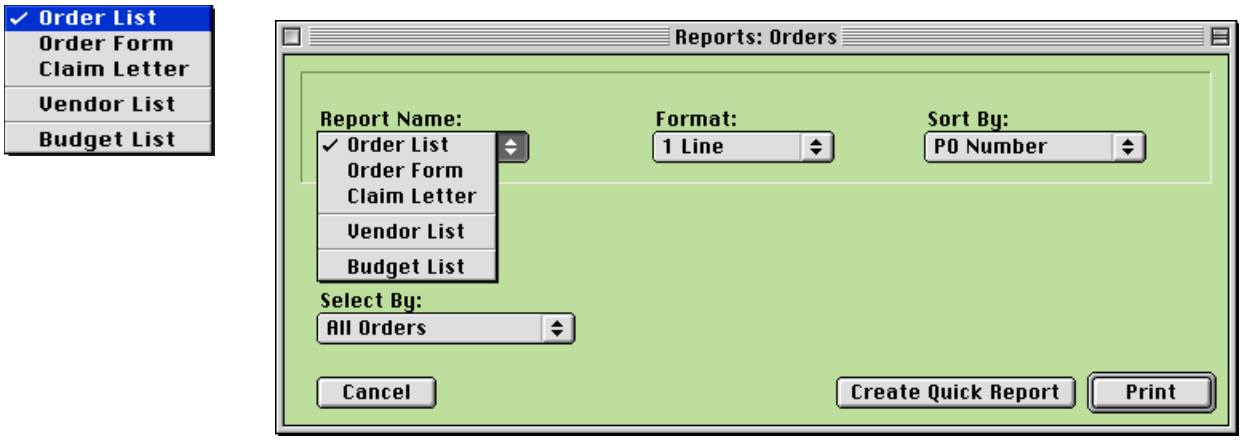
Preparing Order, Vendor & Budget Reports

Order reports give you immediate access to information about the orders processed in your library. To prepare Order Reports, follow these steps:

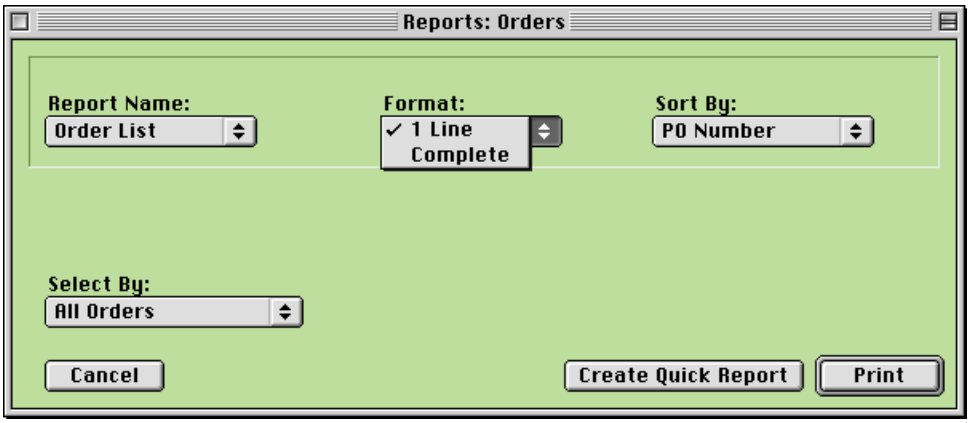
Step 1. Choose **Order Reports** from the **Reports** menu.



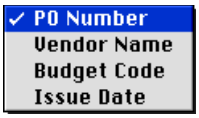
Step 2. Choose the type of report you want from the **Report Name** pull-down menu.

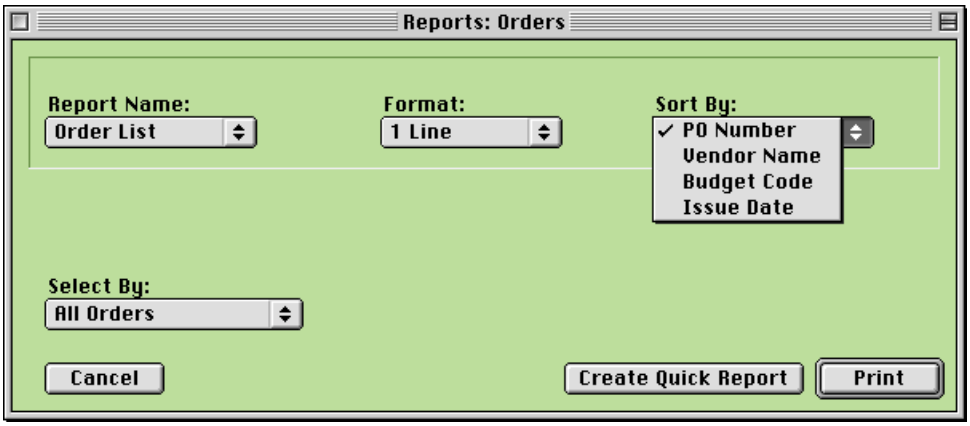


Step 3. Choose how you want to have your report displayed, under the **Format** pull-down menu.

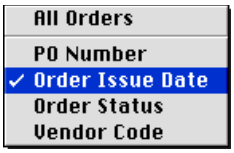


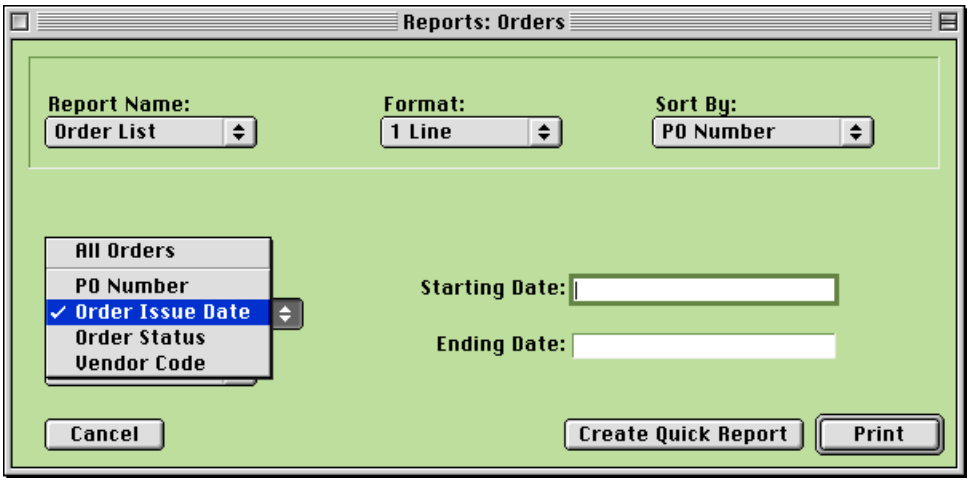
Step 4. Choose the **Sort By** order for this report.

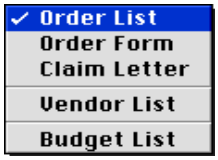




Step 5. Use the **Select By** pull-down menu to select which order records to include in this report.







Step 6. Click on the **Print** button to prepare the report.

Step 7. Make any desired changes using the Word Processor tools.

Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu and Order Report Formats

Order Lists—

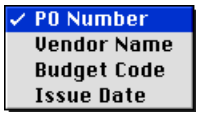
1 line—Prints a one-line summary for each order that includes the PO number, Order Number, Date Ordered, Date Received, Current Status, Number of Line Items, and the total amount of the order.

Complete—Prints all information for the selected orders, including all line item details.

Order Forms—Prints a complete order forms for each order. Only **Open** and **Issued** orders are used for the report, unless you've specified an order status selection. If an order is **Open**, its status is updated to **Issued**. **Closed** orders are generally not printed unless specifically selected.

Claim Letter—Prints claim letters for unreceived items on all the selected orders. Only **Issued** orders are used for the report unless you've specified an order status selection.

Patron Receipt Letter—Prints patron notification letters to all patrons whose items have been received for the selected orders. Only **Issued** and **Closed** orders are used for the report unless you've specified an order status selection.



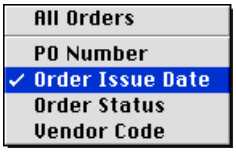
Sorting Options for Order Reports

PO Number—Orders are sorted by PO number.

Vendor Name—Orders are sorted by Vendor name and then by Order Issue Date. Subtotals are printed for each new Vendor.

Budget Code—Orders are sorted by budget code and then by Order Issue Date. Subtotals are printed for each budget code.

Issue Date—Orders are sorted by Order Issue Date.



Selection Options for Order Reports

All Orders—All orders are examined for the report.

PO Number—Only orders within specified PO numbers are included in the report.

Order Issue Date—Only orders within the specified order-issue date-range are included in the report.

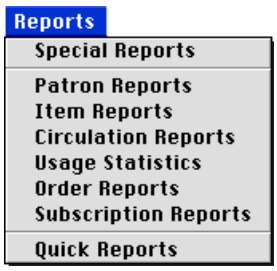
Order Status—Only orders with a specified status chosen below are included.

1 - Open Orders—Only selects orders which have not yet been issued.

2 - Issued Orders—Only selects orders which have been issued to the Vendor.

3 - Closed Orders—Only selects completed (**Closed**) orders.

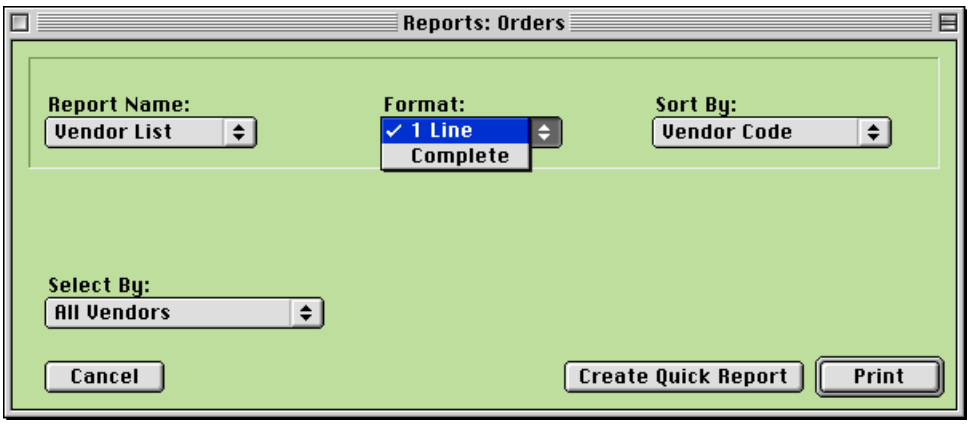
Vendor Code—Only orders with a specified Vendor code are included in the report.



Preparing Vendor Reports

Vendor reports quickly give you information about the Vendors used in your library. To prepare a Vendor Report, follow these steps.

Step 1. Choose **Order Reports** from the **Reports** menu.



Step 2. Choose the type of report you want from the **Report Name** pull-down menu.

Step 3. Choose how you want your report **Format** displayed.

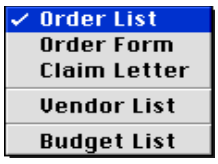
Step 4. Choose the **Sort By** order for this report.

Step 5. Use the **Select By** pull-down menu to select which patron records to include in the report.

Step 6. Click on the **Print** button to prepare the report.

Step 7. Make any desired changes using the Word Processor tools.

Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu.



Vendor Report Formats

Vendor Lists—

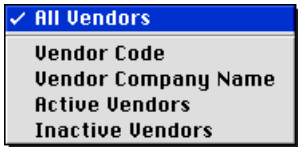
1 line—Vendor information is printed on a brief one-line per Vendor format. The Company Name, Vendor Code, Contact, Telephone, and Status are printed for each Vendor.

Complete—All Vendor information is displayed on the report.

Sorting Options for Vendor Reports

Vendor Code—The report is sorted by Vendor code.

Vendor Company Name—The report is sorted by Vendor company name.



Selection Options for Vendor Reports

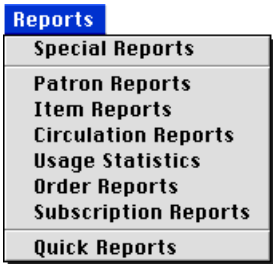
All Vendors—All Vendors are included on the report.

Vendor Code—Only Vendor codes within the specified range are included.

Vendor Company Name—Only Vendor company names within the specified range are included.

Active Vendors—Selects Vendor records which are **Active**.

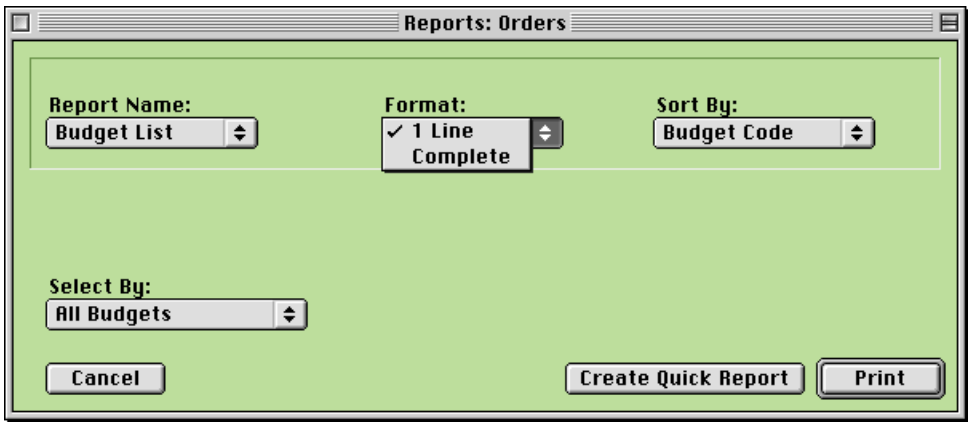
Inactive Vendors—Selects Vendor records which are **Inactive**.



Preparing Budget Reports

Budget reports quickly give you information about the budgets used in your library. To prepare Budget Reports, follow these steps:

Step 1. Choose **Order Reports** from the **Reports** menu.



Step 2. Choose the type of report you want from the **Report Name** pull-down menu.

Step 3. Choose how you want your report **Format** displayed.

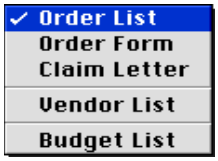
Step 4. Choose the **Sort By** order for this report.

Step 5. Use the **Select By** menu to select which budget records to include in this report.

Step 6. Click on the **Print** button to prepare the report.

Step 7. Make any desired changes using the Word Processor tools.

Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu.



Budget Report Formats

Budget Lists—

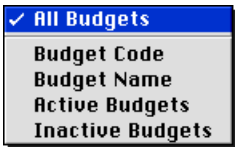
1 line—Budget information is printed on a brief one-line per budget format. The Budget Code, Description, Status, and amount committed and spent amounts are printed.

Complete—All budget information is displayed on the report.

Sorting Options for Budget Reports

Budget Code—The report is sorted by budget code.

Budget Name—The report is sorted by budget name.



Selection Options for Budget Reports

All Budgets—All budgets are included on the report.

Budget Code—Only budgets with codes in the specified range are included.

Budget Name—Only budgets with names in the specified range are included.

Active Budgets—Selects Budget records which are **Active**.

Inactive Budgets—Selects Budget records which are **Inactive**.

Subscription Reports

These reports print information from the Subscription and Routing management windows. Reports exist in the following categories:

Subscription Reports—Contains report options for Subscriptions and Routes.

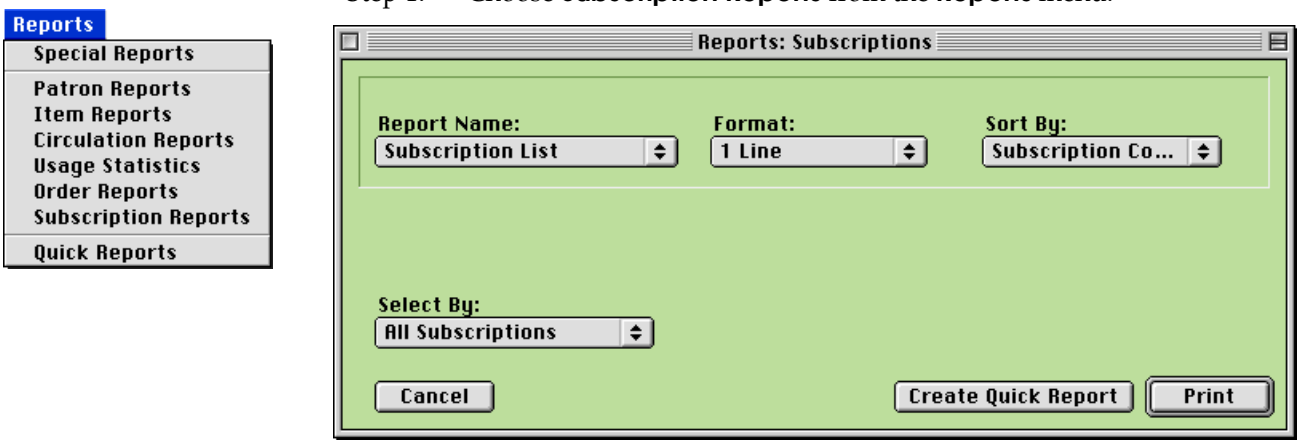
Subscription Reports—Provides reference lists of subscription and renewal lists. Reports include Summary Statistics that provide additional information for budgeting within the library.

Route Reports—Provides lists of routes in summary or detailed formats.

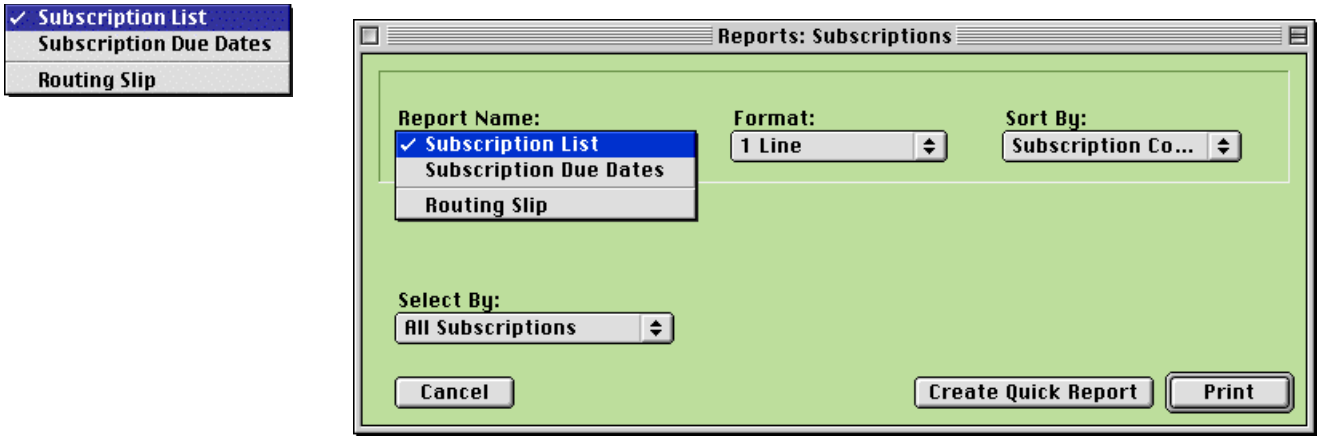
Preparing Subscription & Route Reports

Subscription reports give you immediate access to information about the Subscriptions used in your library. To prepare Subscription Reports, follow these steps.

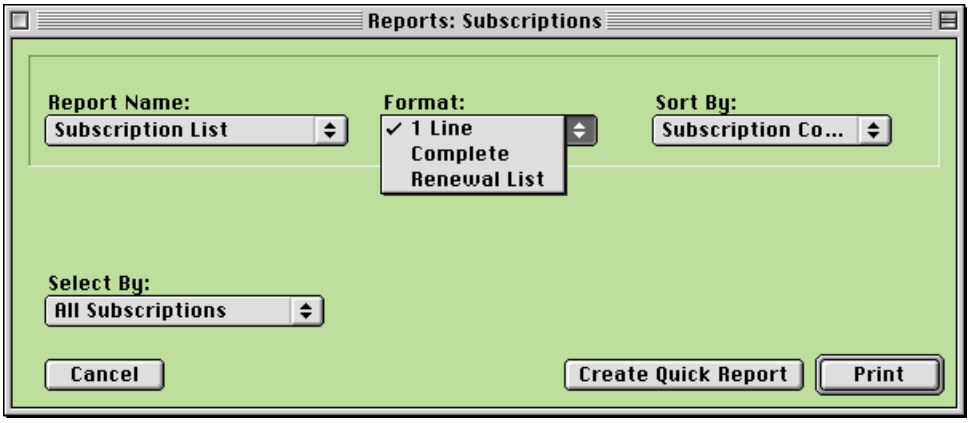
Step 1. Choose **Subscription Reports** from the **Reports** menu.



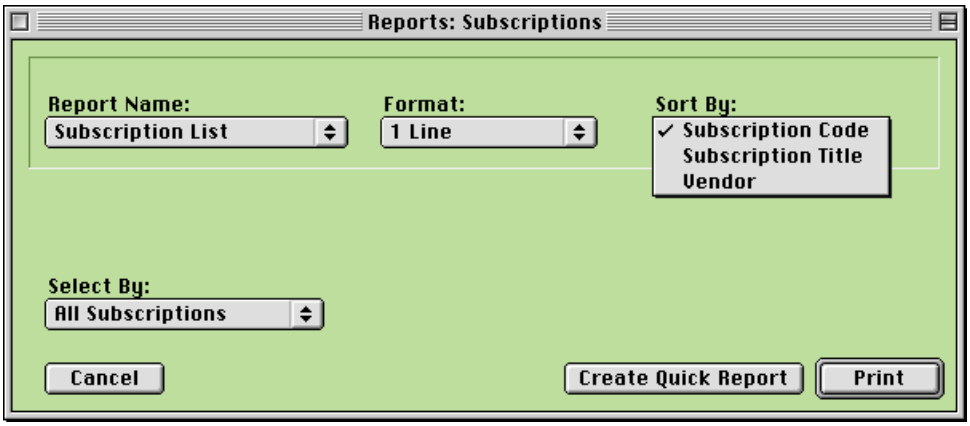
Step 2. Choose the type of report you want from the **Report Name** pull-down menu.



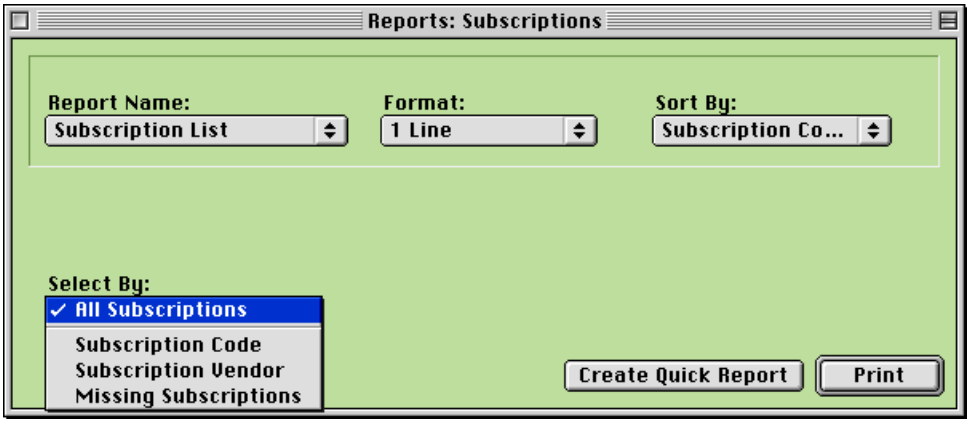
Step 3. Choose how you want your report **Format** displayed.



Step 4. Choose the **Sort By** order for this report.



Step 5. Use the **Select By** pull-down menu to select which subscription records to include in this report.



Step 6. Click on the **Print** button to prepare the report.

Step 7. Make any desired changes using the Word Processor tools.

Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu.

Subscription Report Formats

Subscription Lists—

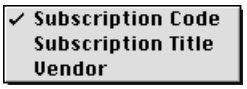
1 line—A brief one-subscription-per-line report is printed. The Subscription Name, Title and Frequency are shown.

Complete—All Subscription information is included on this report.

Renewal List—A brief one-subscription-per-line report is printed, including the Subscription Name, Title, Renewal Date, and Cost. A total cost is printed at the bottom of the report. Use this report to review subscriptions that are due for renewal, or estimate the budgets required for subscriptions.

Subscription Due Dates—Track any subscriptions that are past due.

Subscription History—Lists the date when each issue was received and the number of issues remaining. There is a page break between each subscription.



Sorting Options for Subscription Reports

Subscription Code—The report will be sorted by the Subscription Code.

Subscription Title—The report will be sorted by the Subscription Title.

Vendor—The report will be sorted by the orders' Vendor Name.

Selection Options for Subscription Reports

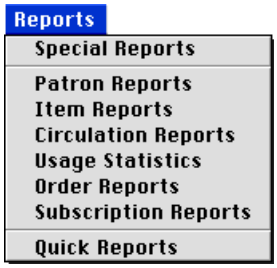
All Subscriptions—Include all subscriptions in the report.

Renewal Date—Includes subscription with renewal Dates in a specified range.

Subscription Code—Include subscriptions with Codes in a specified range.

Subscription Vendor—Include subscriptions with Vendors in a specified range.

Missing Subscriptions—Include only those subscriptions that have not been received as expected. Use this selection to ensure that the library is receiving all items.

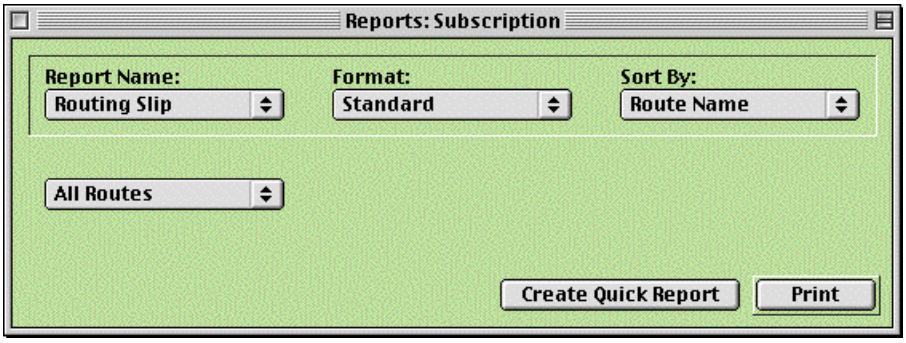


Preparing Route Reports

Route reports give you immediate information about the routes used in your library. To prepare a Subscription Report, follow these steps:

Step 1. Choose **Subscription Reports** from the **Reports** menu.

Step 2. Choose the type of report you want from the **Report Name** pull-down menu.



Step 3. Choose how you want your report **Format** displayed.

Step 4. Choose the **Sort By** order for this report.

Step 5. Use the **Select By** pull-down menu to select which subscription record to include in this report.

Step 6. Click the **Print** button to prepare the report.

Step 7. Make any desired changes using the Word Processor tools.

Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu.

Route Report Formats

Routing Slips—Prints routing slips for all selected routes. Generally, Alexandria will either print the routing slips automatically when items are received, or you'll print them individually from the **Routing Management** or **Circulation** window. However, if you'd like to print several at once, this report is available.

1 line—A brief one-line-per-route report is printed.

Complete—All Routing information is included on this report.

Sorting Options for Route Reports

Route Name—The report will be sorted by the Route Name.

Responsible Patron Name—The report will be sorted by the Responsible Patrons name.

Selection Options for Route Reports

All Routes—Include all routes in the report.

Route Name—All routes within a specified range are included in the report.

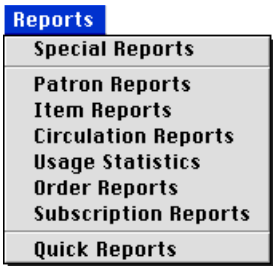
Responsible Patron Barcode—All routes within a specified range are included in the report.

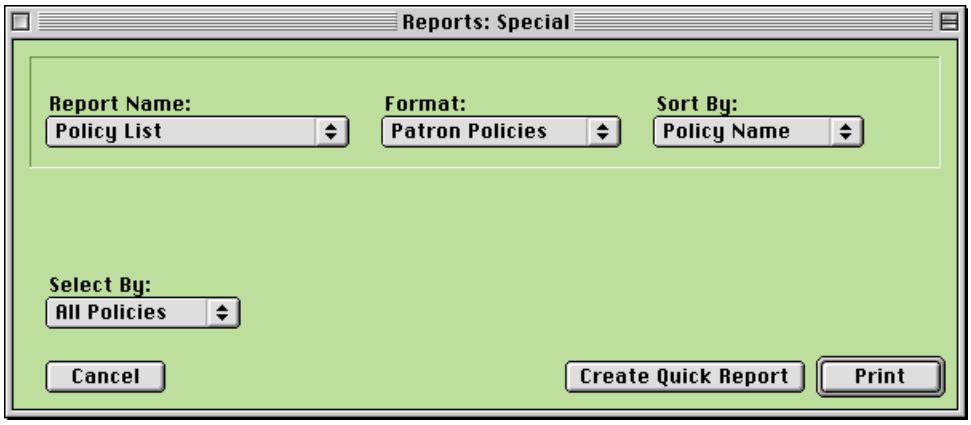
Special Reports

These reports are special, because they don't seem to fit into any other categories. They are used for displaying and printing information about your Policies, Calendars, Barcode Labels, and your Registration Card.

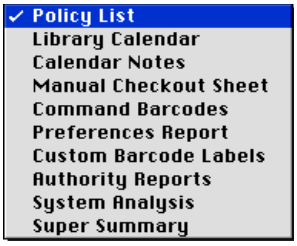
Preparing Special Reports

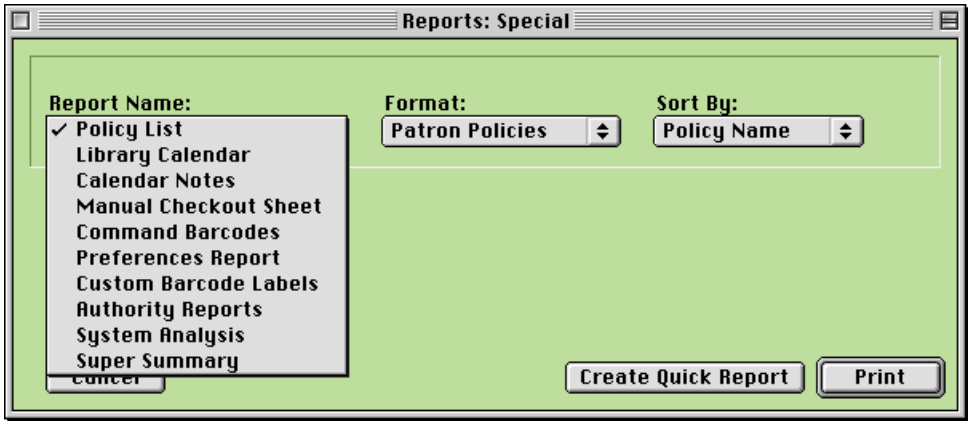
Step 1. Choose **Special Reports** from the **Reports** pull-down menu.



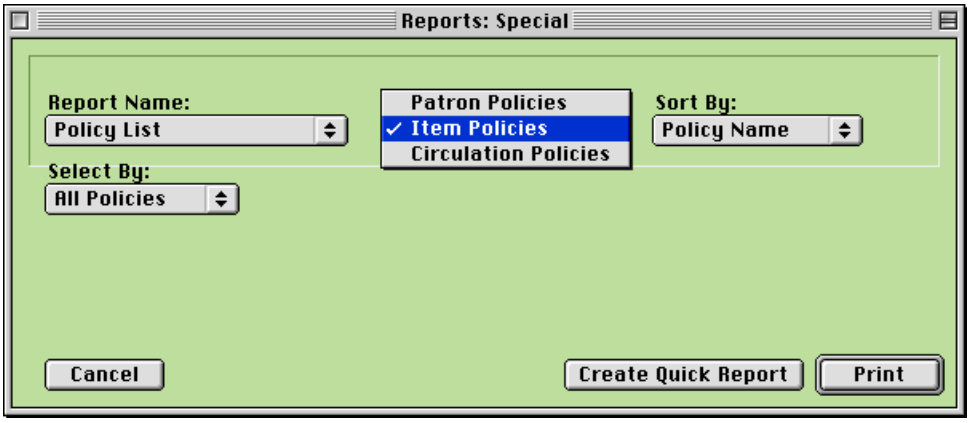


Step 2. Choose the type of report you want from the **Report Name** pull-down menu.





Step 3. Choose how you want your report **Format** displayed.



Step 4. Select the **Sort By** option for your report.

Step 5. Use the **Select By** pull-down menu to set options for the report.

Step 6. Click the **Print** button to prepare the report.

Step 7. Make any changes to the formatting.

Step 8. Choose Print from the **File** menu.

Special Report Formats

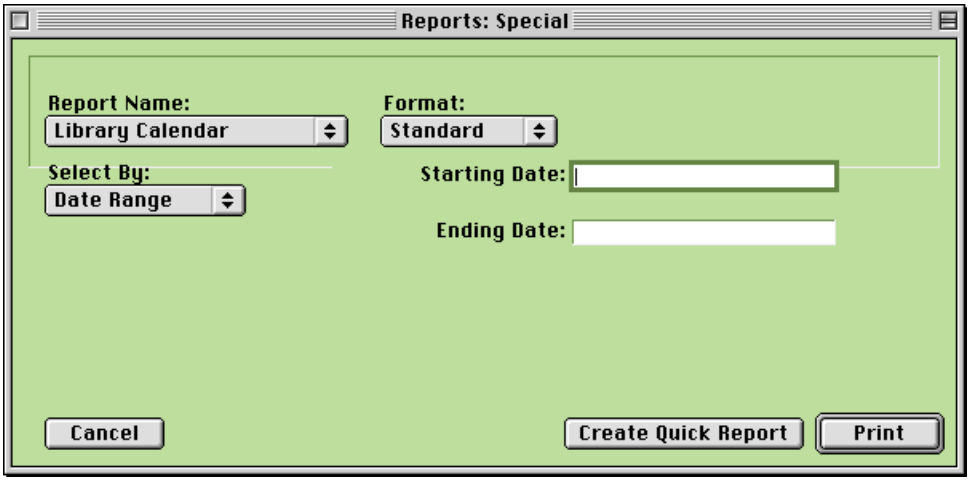
Policy Lists—Use this report to document all Policies that you've defined.

Patron Policies—Prints a report which includes all Patron Policies sorted by the full Policy Name.

Item Policies—Prints a report which includes all Item Policies sorted by the full Policy Name.

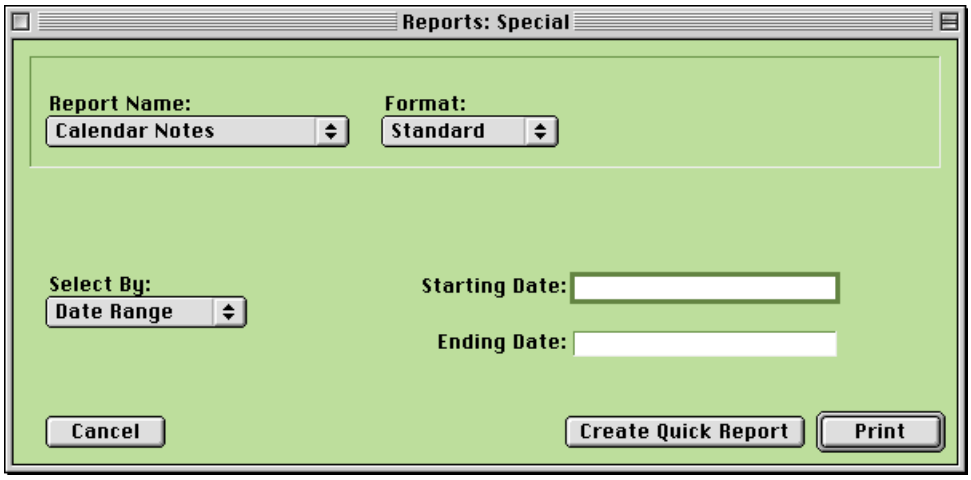
Circulation Policies—Prints a report which includes all Circulation Policies sorted by the full Policy Name.

Library Calendar—This report prints calendars in a one-month-per-page format over a specified date range. Only the month of the **Starting** or **Ending Date** is used, although the program requires you enter a full date.

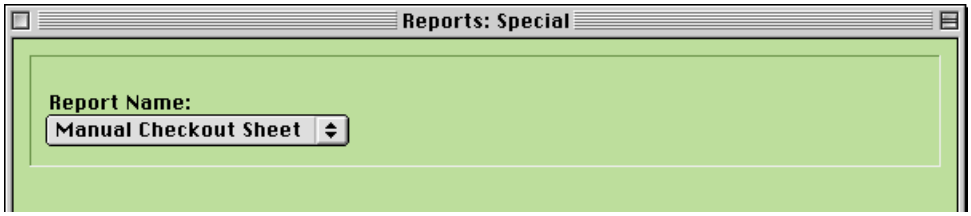


You can use this report to post the library's Open, Closed and Period Due Dates for any calendars in your system.

Calendar Notes—This report prints the selected library calendar notes throughout a specified date range.



Manual Check out Sheet—Print and create forms to use in your library in case your computer system isn't available. It's a simple form that can be used to record transactions which can later be entered into Alexandria when the system is active again. You can also use one of COMPanion's portable laser scanners to perform transactions when the computer system isn't available.

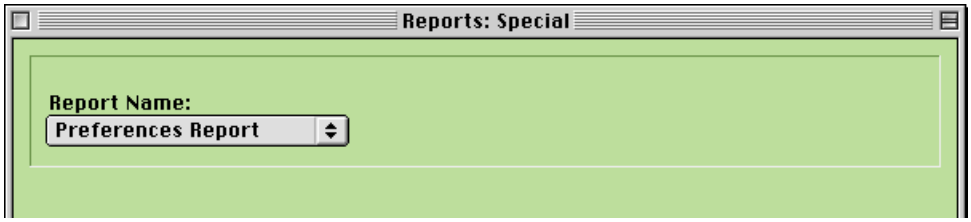


NOTE:
These command labels can be used with the portable reader to enter Circulation commands into the reader.

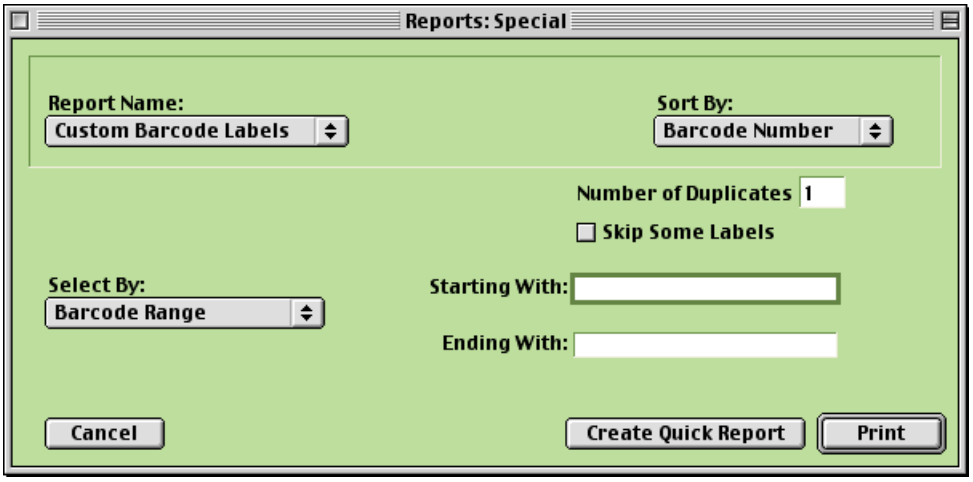
Command Barcodes—Prints a sheet of barcodes that can be used to scan commands into the **Circulation** window.

To perform a specified command in the **Circulation** window, just scan the command with your scanner. Print this sheet and attach it to your desk for quick-entry of Circulation commands.

Preferences Report—A report of all library preferences which are *not* available through other reports.



Custom Barcode Labels—This report prints barcode labels, sorted by number, over a specified range. This report will only work with Sheet Feed printers. It will print Code 3 of 9 labels (30 per page) on special laser-printer paper available from COMPanion. Enter a starting and ending number.



When you click **Print**, you'll see the following window:

This window allows you to enter the text that will be printed on the top and bottom of the labels that you are printing.

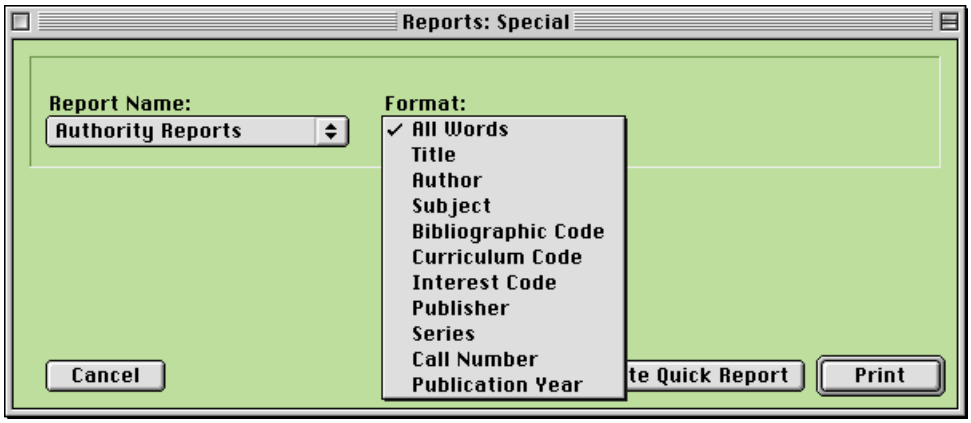
You can use these labels for any purpose. Typically, you'll use them for printing temporary barcode labels and creating new item and patron labels.

However, the advantage of printing item/patron labels from the other barcode printing reports is that patron labels will have the patron's name on them, and item labels will have the title and call number printed on them.

- NOTE -

If you are planning on using label protectors, test all your scanners before placing labels protectors over your labels. Some combinations of protectors/scanners don't work well together and you don't want to be forced to replace your scanners or labels if there is a conflict.

Authority Reports—This report provides information on the terms created in your Catalog. This report includes the full term, its type, and how many entries contain that term.



All Words—All entries in the Item Dictionary are included.

Title—Only Title entries are included.

Authors—Only Author entries are included.

Subject—Only Subject entries are included. Please note that Subject entries are for Subject subfields only, not for full Subject phrases.

Bibliographic Code—Only Alexandria Bibliographic Codes are included.

Curriculum Code—Only Alexandria Curriculum Codes are included.

Interest Code—Only Interest codes entries are included.

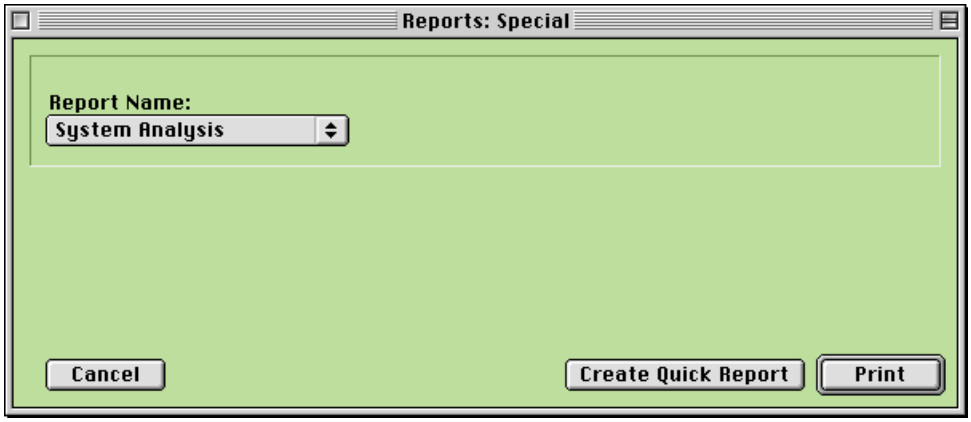
Publisher—Only Publisher name entries are included.

Series—Only Series entries are included.

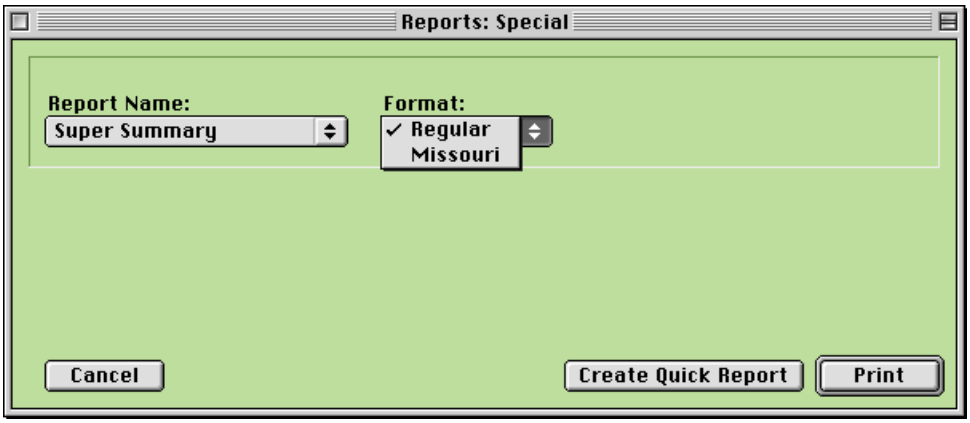
Call Number—Only Call Number entries are included.

Publication Year—Only Publication Year entries are included.

System Analysis—This report shows information about your Computer System and Alexandria Data Files.



Super Summary—This report performs a comprehensive analysis of your collection. The default entries are called **Regular Super Summary** and **Missouri Super Summary**.



Typically, you'll want to perform the analysis on your entire collection.

Super Summary Report Details

Super Summary reports are used to perform detailed analysis of the items in your collection. Typically, the analysis is performed on your entire collection.

The Regular Super Summary

The Regular Super Summary performs a detailed analysis of the items in your collection. Statistics are collected based on the Financial date range, the last calendar month, and the last 12 months. It collects the following pieces of information:

Title Based Statistics are only collected for titles with copy records. Title records without copy records are counted separately. Copies which are Lost or Discarded are NOT included in the calculations except for the Lost and Discarded counts of the current financial year *(see "Orders Preferences" on page 90)*.

- **Title Count—**Total number of Titles in the selected group.
- **No Copies—**Count of titles that have no copies
- **Copyright 2yr—**Count of copies in Copyright range of 0-2 years.
- **Copyright 3-5yr—**Count of copies in Copyright range of 3- 5 years.
- **Copyright 6-10yr—**Count of copies in Copyright range of 6-10 years.
- **Copyright 11-20yr—**Count of copies in Copyright range of 11-20 years.
- **Copyright 20+yr—**Count of copies in Copyright range of 20+ years.
- **No Date—**Count of copies with no copyright date.
- **Jan-Dec Usage—**Monthly Title Usage counts for each month. These counts come from the Title Statistics information record (12 columns of data, one for statistics in each month.)
- **YTD Usage—**Title Year-To-Date usage over the last 12 months.
- **LTD Usage—**Life-To-Date usage counts for each title.

NOTE:

Date range for **Lost** and **Discarded** and **New** is specified in financial year references under Orders Preferences.

Copy Based Statistics are computed for each copy in the selection range.

- **Copies—**Total Count of Copies in a group—except copies which are Lost or Discarded.
- **New—**Count of items with Accession Dates within a specified date range.
- **New Value—**Total value of new copies totaled above.
- **Inventoried—**Count of items inventoried within a specified date range. Date range for Inventoried is the last calendar month.
- **Value—**Total value of inventoried copies above.
- **Lost—**Count of items lost within a specified date range. Since this statistic is only over the specified date range, more Lost items may be in your inventory.
- **Lost Value—**Total value of lost copies counted above.
- **Discarded—**Count of items discarded within a specified date range. Since this statistic is only over a specified date range, more Lost or Discarded items may be in your inventory.
- **Discarded Value—**Total value of Discarded copies counted above.

The Missouri Super Summary

The Missouri Super Summary collects the following pieces of information.[1]

1. **Holdings—**A count of the number of copies in a selection group.
2. **Older—**A count of the number of copies with publication dates that are 13 years old (or older) from the end of the current financial year.
3. **Newer—**A count of the number of copies with publication dates that are less than 13 years old from the end of the current financial year.
4. **% Newer—**The percentage of items that are newer.

1. This data is NOT collected for copies that are Lost or Discarded.

Super Summary Statistics Groups

Statistics are collected based on Call Number and Item Policy over the entire selection. For Call Number Statistics, numeric sub-divisions are grouped into the following categories for each Call Number prefix. Numbers with no prefix are shown below.

Standard Super Summary uses these numeric selections:

```
000-099 (less 092s)
092 Only
920 Only
100-199
200-299
300-399
400-499
500-599
600-699
700-799
800-899
900-999 (less 920s)
```

Missouri Super Summary uses these numeric selections:

```
000-319
320-329
330-339
340-359
360-369
370-379
380-389
390-519
520-529
530-549
550-559
560-569
570-579
580-609
610-619
620-629
630-999
```

If the Call Number begins with a **Numeric** character, the following is performed.

- All **non-Numeric** characters are removed.
- The first **three** numeric characters are kept (up to a decimal point).
- If fewer than **three** digits remain, zeros are padded to the front.
- This value is considered the **Numeric Call Code**. Thus "`45.24`" gets turned into "`045`" and "`100.347`" gets turned into "`100`".
- The **Numeric Call Code** is then updated to match the ranges in the selection groups shown on the previous page. Thus, "`045`" would map to "`000-099`" in the Standard Super Summary, but in the Missouri Super Summary it gets grouped as "`000-319`".

Super Summary Call Number Prefix definitions

If the Call Number begins with an **Alpha** character, the Call Number prefix is computed based on the prefix of the call number.

First, all leading **Alpha** characters are collected from the beginning of the Call Number.

These characters are examined and classified according to the following table (i.e. if there is an E or EZ, it's turned into 'Easy'—call this the **Group Name**). If the numeric characters follow the **Alpha** characters, they are extracted using the numeric character extraction rules shown above. The full **Group Name** is then created by appending the **Group Name** with the **Numeric Call Code**.

Thus reference books with a call number of "`REF 100.000`" fall into the analysis group of **Reference 100-199**. If no code exists for a call number prefix, the group "`·Other`" is used. Call Numbers that are counted under "`.No Text`" Call Numbers with no prefix (such as 100.34) fall into group "`100-199`".

- NOTE -

Call Number Statistics Groups do not overlap. A copy is only included in *one* group. Thus, "`REF 100`" goes into group "`REF 100-199`" but is *not* added to group "`100-199`".

NOTE:

Fiction items that do not have a Call Number prefix before the cutter (first three letters of the author's last name) cause the Super Summary to be unaffected for a Call Number analysis.

A Call Number prefix is assigned a Name based on a group of prefixes which are mapped into the named group. Call number prefixes are not case sensitive. These following groups are defined for all Super Summary reports. Thus, Call Numbers that begin with "`C`" or "`CAS`" are added to the statistics group "**Cassettes**."

- `AV Stand—AVS, AV`
- `Audio Visual—AV, AUD`
- `Biography—B, BIO, BI`
- `CD ROM—CDR`
- `Cassette Player—CP`
- `Cassettes—C, CAS`
- `Classes—CLA`
- `Compact Disk—CD`
- `Computer Software—CS`
- `Computer—COMP`
- `Data Display—DDP`
- `Easy NF—ENF`
- `Easy—E, EZ, EASY`
- `Equipment—EQ, EQU, EQUIP`
- `Fiction—F, FIC`
- `Film Projector—FP`

- Filmstrip—FSP, FS, FSK, FSS
- Game—GAM
- Head Phone—HP
- Juvenile Fiction—JF
- Juvenile Non Fiction—JN, JNF
- Kits—KIT, K, KITS
- Laser Disk—LD, LSD
- Listening Station—LS
- Model—MOD
- Newspapers—NEW, NEWS
- Non Fiction—NF, NFC, N
- Opaque Projector—OPQ
- Overhead Projector—OHP
- Oversized—O, OS, BIG, LG, L
- Periodical—MAG, M, PER, P, J, JOR, JRNL
- Picture—P, PIC
- Professional—PRO, PROF
- Record Player—RP
- Recording—REC
- Reference—R, REF
- Screen—SCR
- Slide Projector—SLP
- Slides—SLI
- Story Collection—S, ST, STO, SC
- Study Print—SPR
- Television—TV
- Transparency—TRA
- Vertical File—VF, V, PAM
- Video Cassette Recorder—VCR
- Video Disc Player—VDP
- Video Disk—VD
- Video—V, VC, VID, VT, VTC
- Young Adult—Y, YA
- .No Text—empty call numbers.
- Other—Alpha call number prefixes not listen above.

- NOTE -

At the same time that Call Number statistics are collected, the Super Summary examines the Policy of each Copy and updates statistics across each policy.

In the same way, a group exists which includes all sub-groups, thus resulting in a total count over the item selection criteria.

Alexandria Utilities

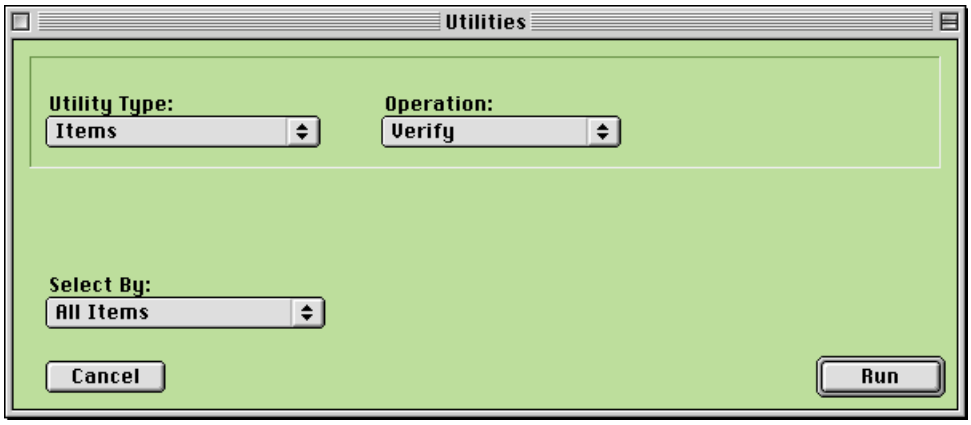
Most operations in Alexandria are designed to modify individual pieces of information one entry at a time. Utilities are special functions that change large amounts of information in your Alexandria Database with a single command.

Although they don't modify records in your database, Utilities are used to export data from Alexandria to other electronic systems or between Alexandria Databases.

W A R N I N G !
Before you use Utilities, Archive your data. Thus, if you discover that you've performed an operation that has damaged your data, you can recover to a previous archive.

How to Initiate a Utility

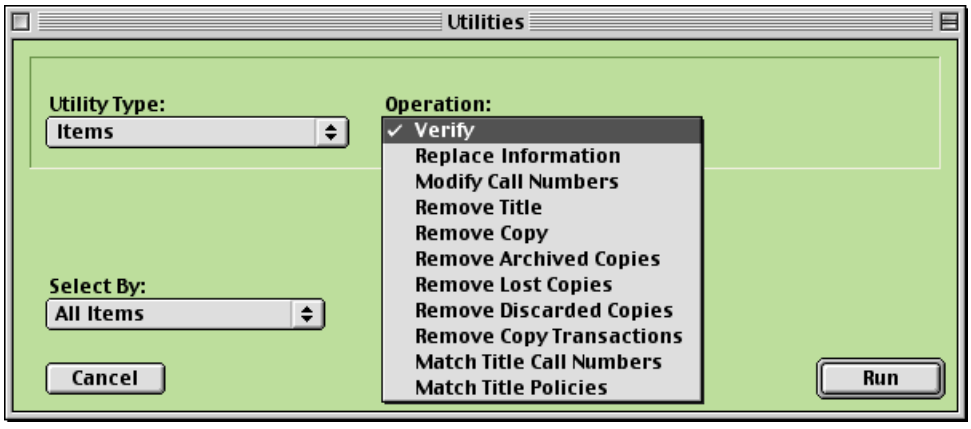
From the **File** menu, open the initial **Utilities** window.



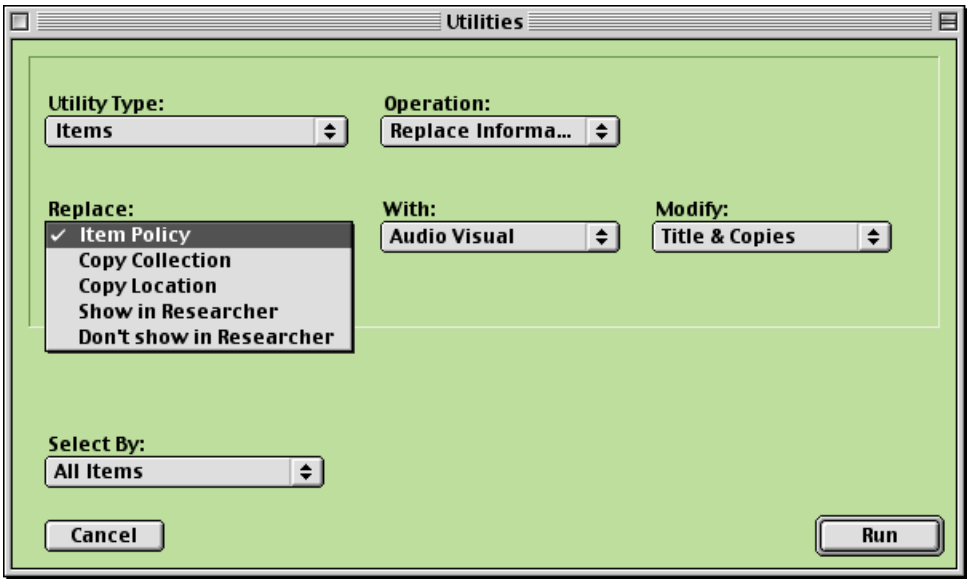
Use the following general steps to begin a utility.

Step 1. Select a utility type from the **Utility Type** pull-down menu.

Step 2. If the utility you've selected has more than one option, an **Operation** pull-down menu appears. Select an Operation from the **Operation** pull-down menu.



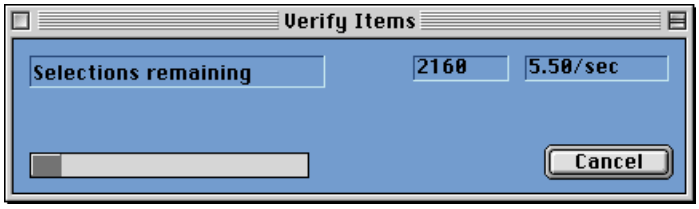
Step 3. Some Operations require additional information. Fill in the specific Operation information as required by the utility.



Step 4. Use the **Select by** pull-down menu to select which records are to be processed by the utility. You can make as many selections with **And**, **Or**, and **And Not** (Boolean logic) as you require. However, you'll need a large monitor to see all the choices since the window will drop off the bottom of your screen.

When you choose values in the selection pull-down menus, other fields may appear, asking you for other required information.

Step 5. Press the **OK** button. As Alexandria performs the Utility, a status window appears. You can cancel the utility by clicking the **Cancel** button. Note that this will only stop the utility; any records modified before you stop will remain modified.



Step 6. As the utility is processing, you can perform other tasks within Alexandria. For example, you can check items in and out, or prepare a report. Some Utility operations execute at a lower priority than most Alexandria processes. Thus, if you run a Report, the Utility will rest while the report is processing.

If the utility status window is hidden behind other windows, select it from the **Windows** menu to bring it to the forefront.

Step 7. When the utility is complete, the status window automatically closes and a "utility complete" entry is placed in the Circulation log. Many utility functions will create entries in the log so you can monitor which records are modified.

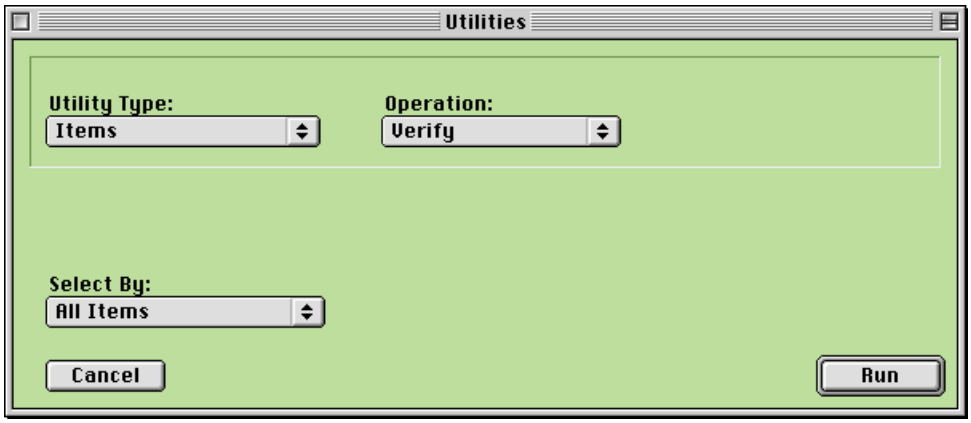
Item Utilities

Item utilities are used to modify groups of items in your collection. These utilities let you easily and quickly add, modify, and remove information for groups of items. For example, there are utilities to remove groups of items, replace copy locations for a group of items, and change Call Number prefixes for a group of items.

To make changes to groups of items, the group must have something in common for Alexandria to select. For example, you can change the location for all items of a certain material type because they have the material designator in common.

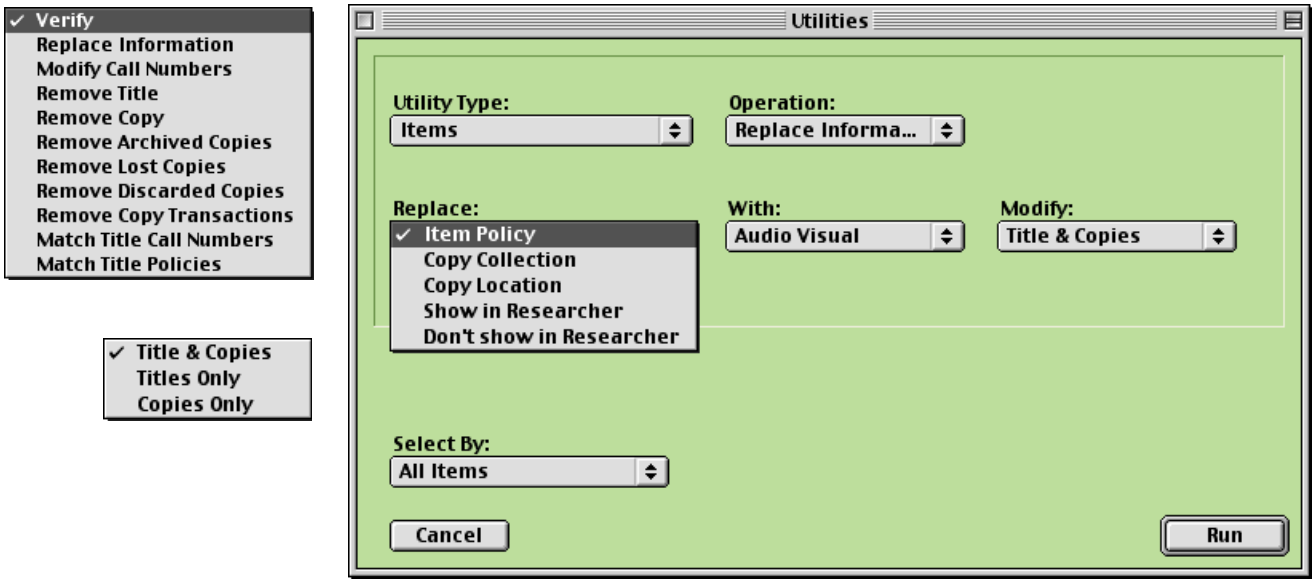
Item Utilities can be performed on many different groups of items. The selection options available are the same as Item reports *((see "Selection Options for Item Reports" on page 295))*.

Verify Items



Use this utility to verify the internal status of a group of items. This procedure reviews statistical information and internal database relations for the selected items. If problems are found, they are automatically fixed. If you've had data damage due to power outages or other hardware failures, you should run this utility to repair any damage.

Replace Information



Use this utility to change an existing value to a new value for a group of items. The following options are available:

Item Policy—Replaces the Policy for the selected Copies. If you select only **Titles & Copies**, all copies for that title are updated. Use the pull-down menu to specify which Policies are modified.

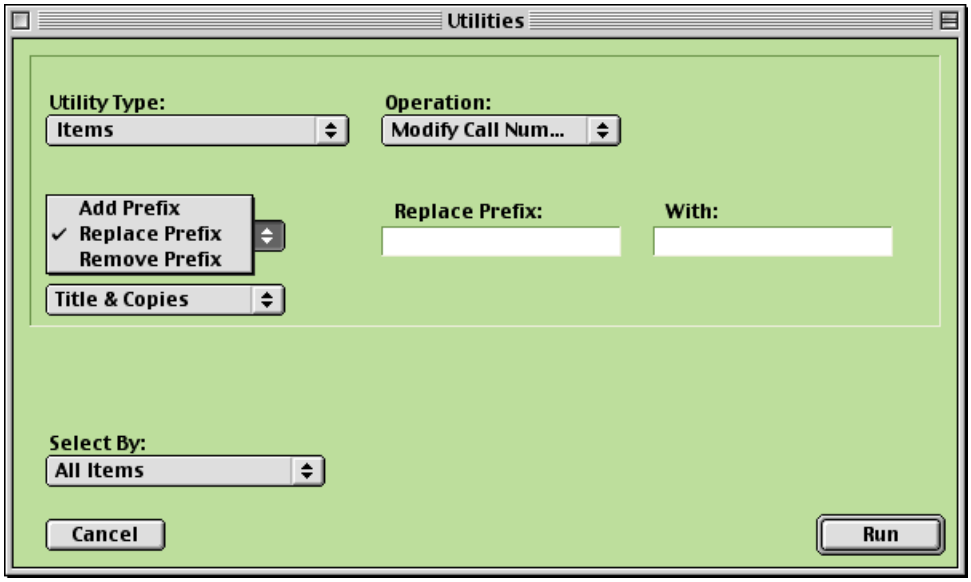
Copy Collection—Replaces the Copy Collection data with whatever you specify.

Copy Location—Replaces the Copy Location data with whatever you specify.

Don't Show in Researcher—Sets the **Don't Show in Alexandria Researcher** check-box to **ON** for each Title selected.

Show in Researcher—Sets the **Don't Show in Alexandria Researcher** check-box to **OFF** for each Title selected.

Modify Call Numbers



Use this utility to modify Call Numbers for Titles and/or Copies. Only those records selected using the **Select By** pull-down menu are examined or modified.

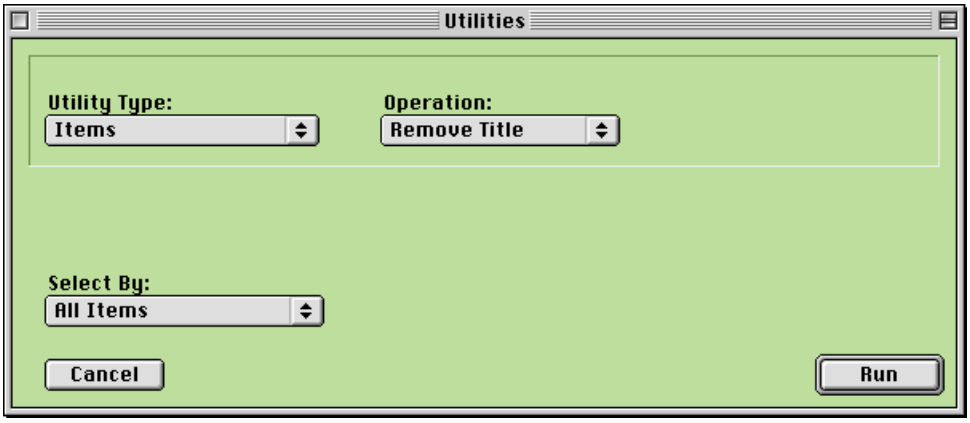
Add Prefix—Adds a specified prefix to the selected items.

Replace Prefix—Replaces a specified prefix with a new value.

Remove Prefix—Removes a specified prefix in matching records.

Use the pull-down menu to specify which Call Numbers are modified.

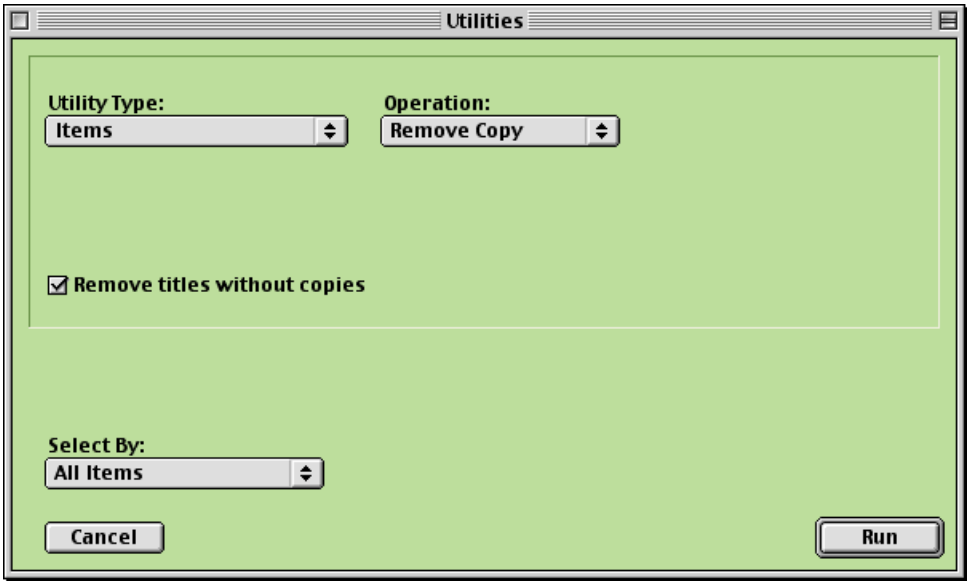
Remove Title



Use this utility to remove a group of Titles. All selected Titles are removed from Alexandria.

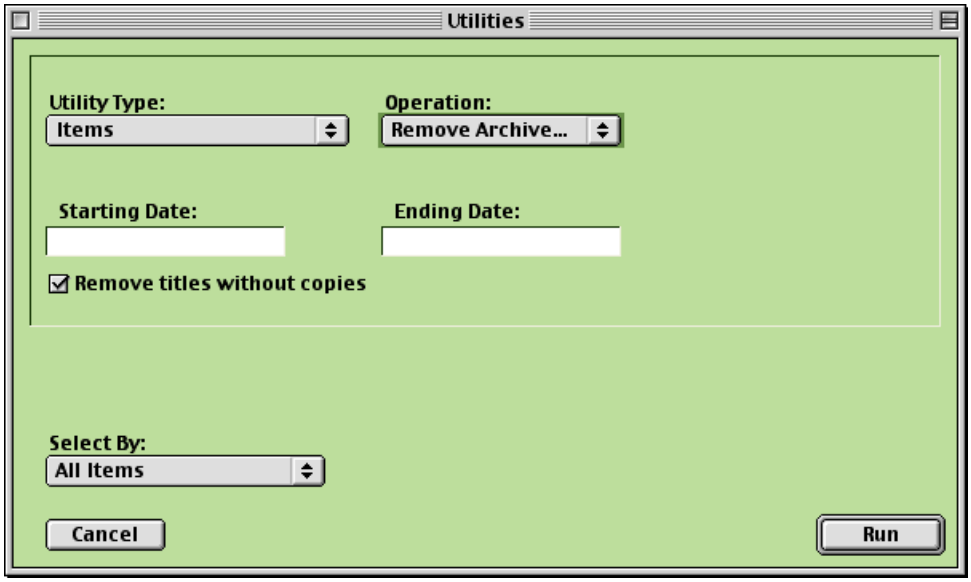
This utility does not remove Titles with copies that are currently checked out. Only copies that are not checked out are removed. When a Title is removed, all pending holds are also removed. When copies are removed, all reservations for those copies are removed.

Remove Copy



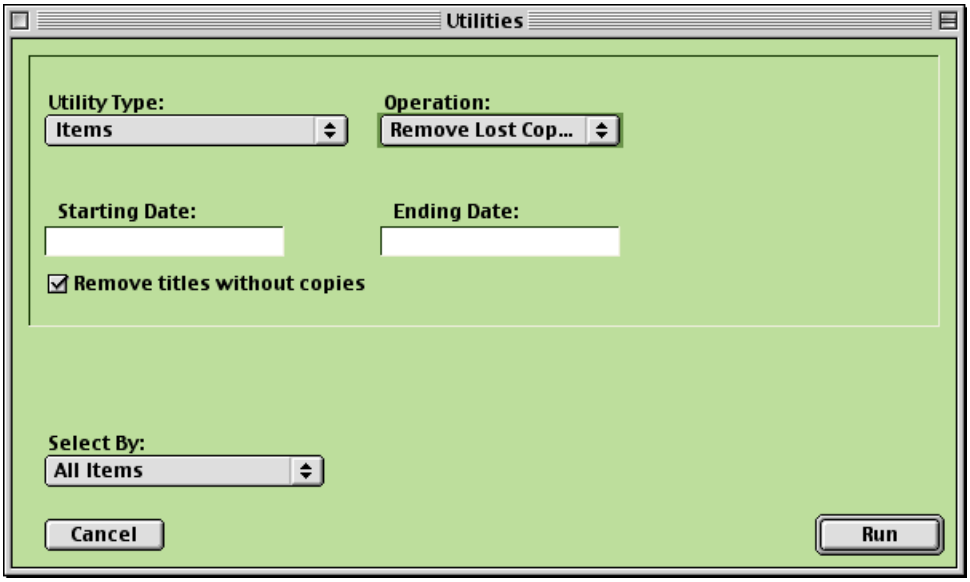
Use this utility to remove a group of item Copies. All selected Copies are removed from Alexandria. This utility does not remove Copies that are checked out. If all the Copies for a title are removed, the title will also be removed if the **Remove titles without copies** check-box is selected. When Copies are removed, all reservations for the Copy are also removed.

Remove Archived Copies



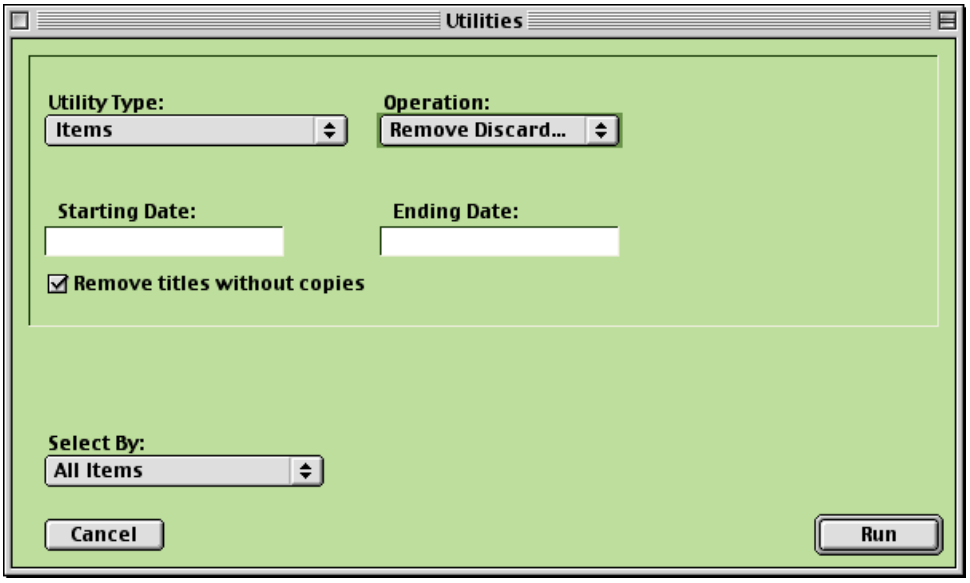
This utility removes all copies that had their status set to **archived** between the **Starting** and **Ending** dates specified. If you leave the starting date blank, Alexandria uses "`"January 1, 1900."`" If you leave the ending date blank, Alexandria uses "`"January 1, 2050."`" Thus, if you leave both dates blank, all archived copies will be removed. The title will also be removed if the **Remove titles without copies** checkbox is selected and there are no remaining copies for that title.

Remove Lost Copies



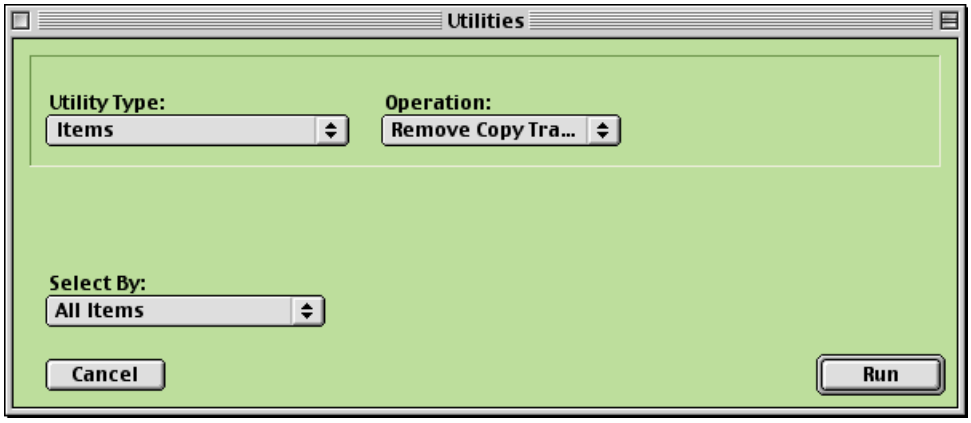
This utility removes all copies which had their status set to **lost** between the **Starting** and **Ending** dates specified. If you leave the starting date blank, Alexandria uses "`January 1, 1900`." If you leave the ending date blank, Alexandria uses "`January 1, 2050`." Thus, if you leave both dates blank, all lost copies are removed. The title will also be removed if the **Remove titles without copies** check-box is selected and there are no remaining copies for that title.

Remove Discarded Copies



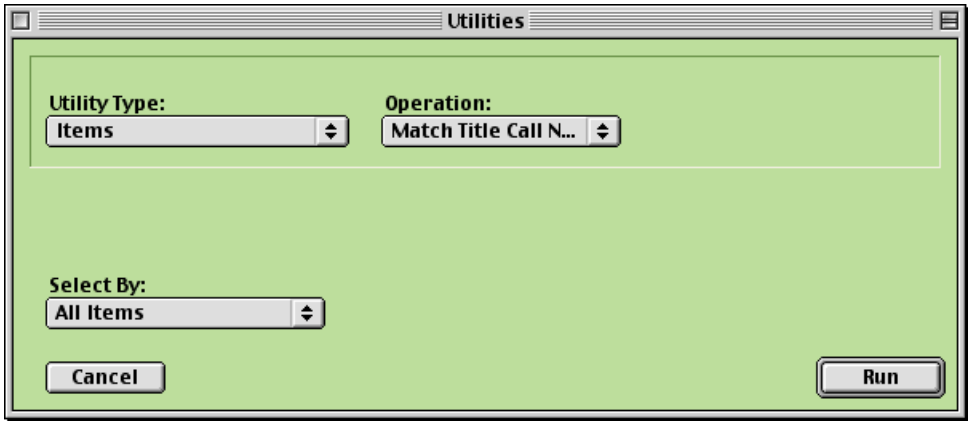
This utility removes all copies which had their status set to **discarded** between the **Starting** and **Ending** dates specified. If you leave the starting date blank, Alexandria uses "`January 1, 1900`." If you leave the ending date blank, Alexandria uses "`January 1, 2050`." Thus, if you leave both dates blank, all lost copies are removed. The title will also be removed if the **Remove titles without copies** check-box is selected and there are no remaining copies for that title.

Remove Copy Transactions



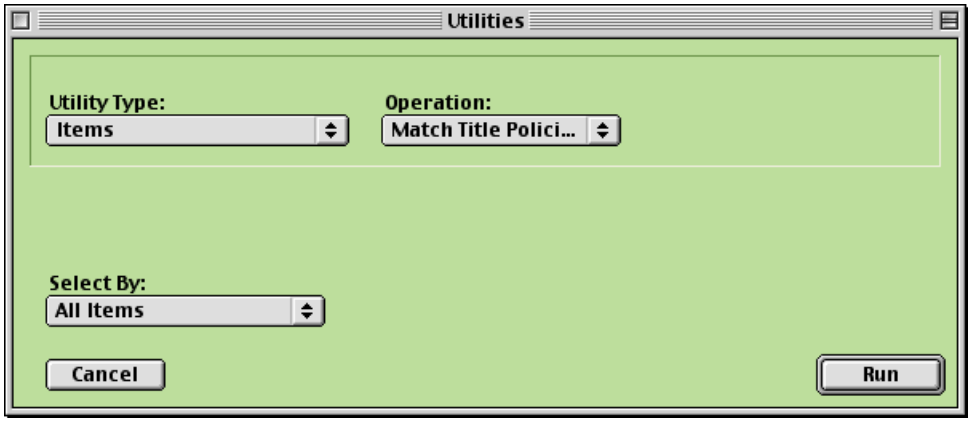
This utility removes all transactions for specified copies. **WARNING**—Do not run this utility unless you want to lose Circulation status for the selected copies!

Match Title Call Numbers



This utility assigns the Title Call Number to all selected copies.

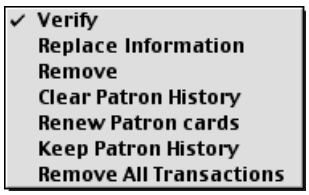
Match Title Policies



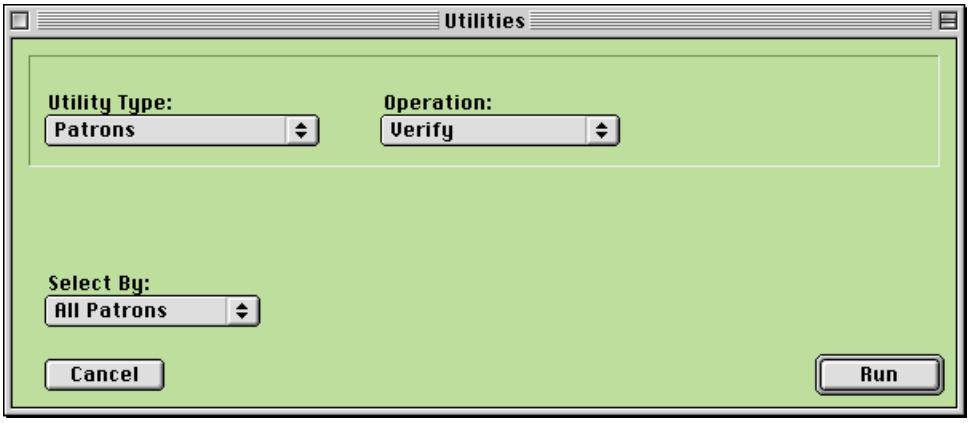
This utility assigns the Title Policy to all selected copies.

Patron Utilities

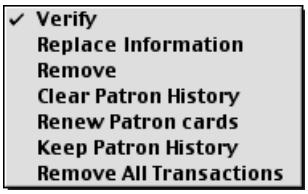
Use Alexandria utilities to change or remove groups of patrons. For example, there are utilities to change patron Policies, renew expired cards, and update expiration dates. Patrons may be selected from the same criteria as Patron Reports *((see "Selection Options for Patron Reports" on page 284))*.



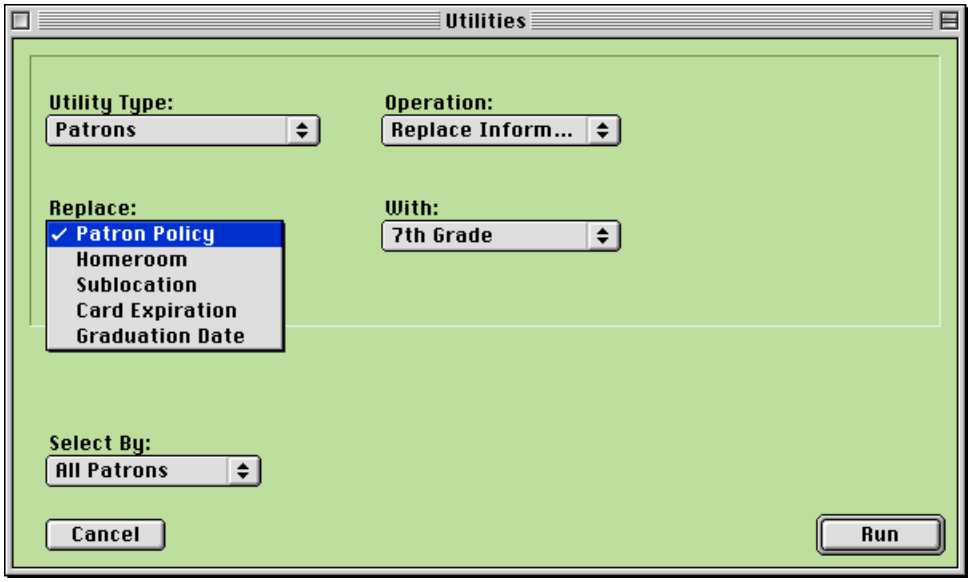
Verify Patron Status



Use this utility to verify the status of a group of Patrons. This procedure reviews all the statistical Circulation Information and statistics for the Patrons selected and ensures that it is accurate. This procedure also examines the graduation year for each Patron and adjusts the grade to match.



Replace Patron Information



Use this utility to change an existing value to a new value for a group of Patrons. The following options are available.

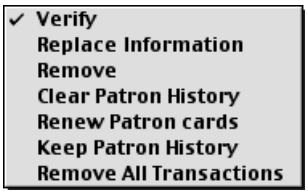
Patron Policy—Replaces the Policy for the selected Patrons.

Location—Replaces the Location field for selected Patrons. In schools, this field is typically called the **Homeroom**.

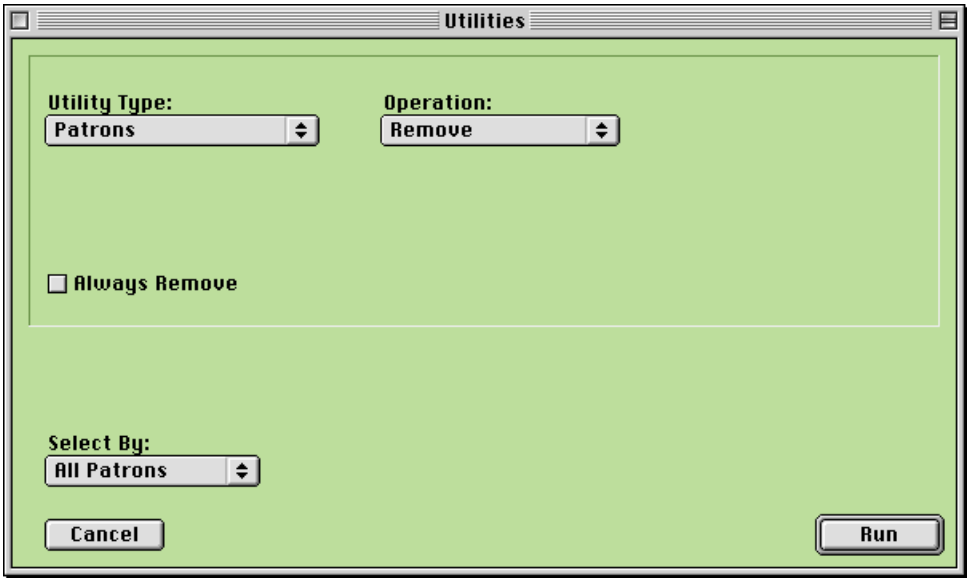
SubLocation—Replaces the SubLocation field for selected Patrons.

Card Expiration—Replaces the Card Expiration date with a specified Date.

Graduation Date—Replaces the Graduation Date with a specified Date.



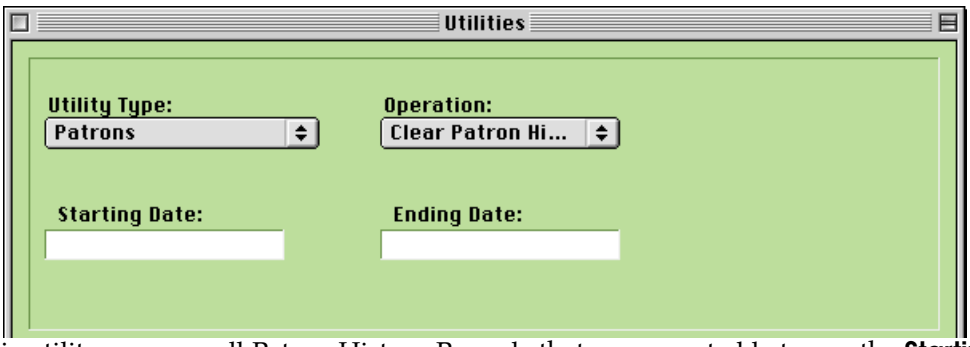
Remove Patrons



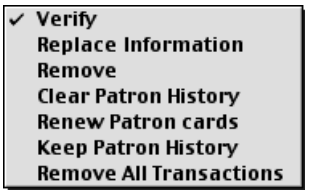
Use this utility to remove a group of Patrons. Use the **Select By** pull-down menu to limit the Patrons you remove. This utility does not remove Patrons who have items checked out or who have a current balance due to the library. If you select the **Always Remove** check-box, Items checked out to Patrons that are going to be removed are marked as **lost** and any pending fines or Charges are forgiven—the Patron is then removed.

When a Patron is removed, all their Holds, Reservations and In-Stock Holds are also removed. If there are any Patron History records, all but Payment History is removed.

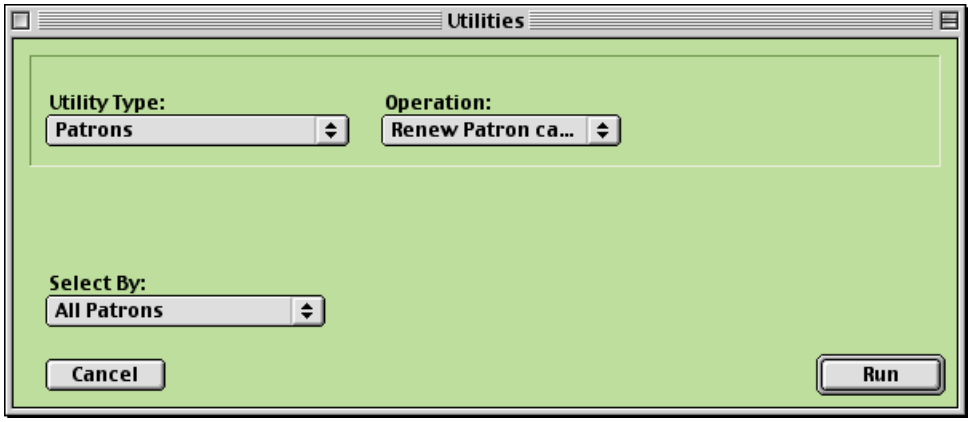
Clear Patron History



This utility removes all Patron History Records that were created between the **Starting** and **Ending** dates specified. If you leave the starting date blank, Alexandria uses "`January 1, 1900`." If you leave the ending date blank, Alexandria uses "`January 1, 2050`." Thus, if you leave both dates blank, all lost copies are removed.

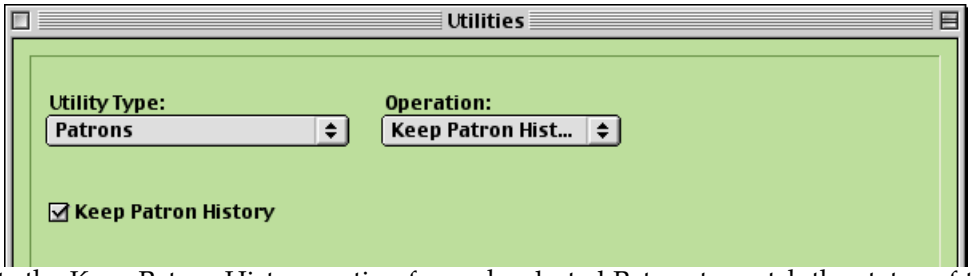


Renew Patron Cards



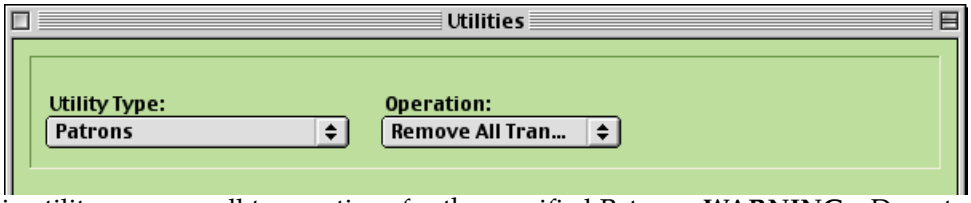
Renews any Patrons whose Card has expired or will expire in the next two weeks. Card is renewed for the period specified in the Patron policy.

Keep Patron History



Sets the Keep Patron History option for each selected Patron to match the status of the **Keep Patron History** check-box specified above.

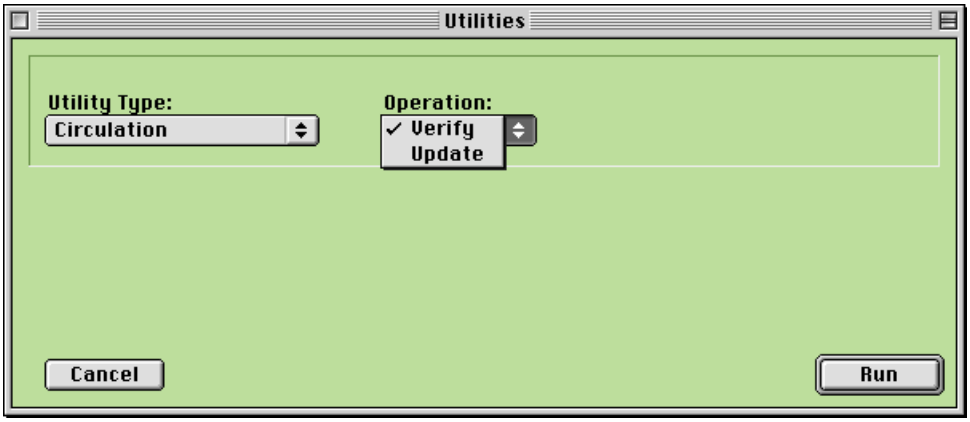
Remove All Transactions



This utility removes all transactions for the specified Patrons. **WARNING**—Do not run this utility unless you want to lose Circulation status for the selected Patrons!

Circulation Utilities

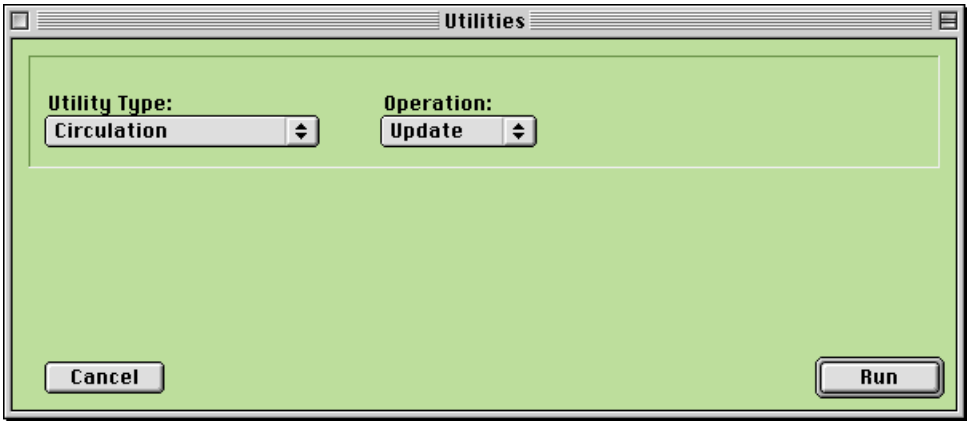
Verify—Examines all Circulation records for internal consistency. Bad Circulation records are either fixed or removed, depending on the type of problem detected. This utility does not update Circulation records with policy changes.



NOTE:

Update will **NOT** modify a manual (period or hard) due date!

Update—Performs the Circulation Verify function for all Circulation records, but also updates changes in policies which have occurred since the transaction. Use this utility if you've set new fine rates and want them applied to existing transactions.



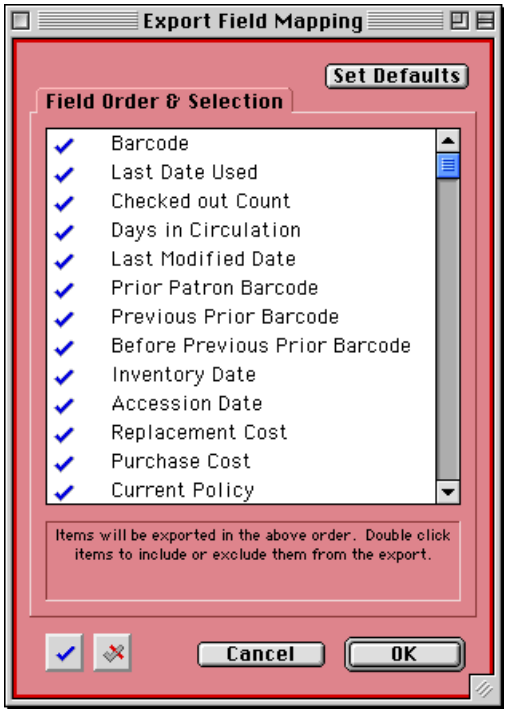
Exporting Item Information

Exporting is the process of moving information out of Alexandria to use in other software applications. You can export records for all (or a specified group) of items.

Exporting item records does not change the original record in Alexandria. Only a copy is exported; the original record remains the same. You can export records from Alexandria in **Marc**, **MicroLIF** and **tab-delimited** formats.

Use the export to archive your item information, create catalogs for selected items, or modify item information using outside applications before importing it back into Alexandria. Select the format of the export in the **Operation** pull-down menu. **Marc** and **MicroLIF** are standard bibliographic formats.

The **tab Separated** format is unique to Alexandria. When this selection is chosen, a **Select Fields** button appears. Click this button to see the following window.



Double-click on a line to exclude it from export. Click and drag lines to change the order of the export *(see "Item fields—Field Numbers" on page 362 for a description of the fields which can be exported and imported)*. Alexandria automatically creates a file header that can be used by Alexandria to import exported files without the user knowing anything about the contents of the data.

- HINT -

You can use the checkmark buttons at the bottom of the window to select or deselect all fields. Use the **Default** button to configure a default list of fields.

Selecting **Print** from the **File** menu will print a report of your selections.

Data can be sorted before export by selecting the **Sort by** selection. Only data for the copies selected is exported. The **tab Separated** format only exports one-copy-per-line exported. Thus, if you export a title with *ten* copies, you'll end up with *ten* tab separated records getting exported.

Because it's easier to read, use **MicroLIF** for full **Marc** records rather than the **Marc** (Communications) format. You can use the virtual Word Processor integrated into Alexandria to view any file you've exported. To view an exported file, use **Open** from the **File** menu to select the file *(for more information on import/export formats, see "Importing Item Information" on page 361)*.

Exporting Patron Information

Exporting is the process of moving information out of Alexandria to use other software applications. You can export records for all (or a specified group) of Patrons.

Exporting Patron records does not change the original record in Alexandria. Only a copy is exported; the original record remains the same.

You can export Patron records from Alexandria in standard **tab-delimited** format (also known as ASCII files). You can examine this kind of file with almost any word processor, spreadsheet or database application.

You can export Alexandria Patron information to use in other software programs. You can choose to export all (or some of) your Patron records.

Double-click on a line to exclude it from export. Click and drag lines to change the order of the export *(see "Patron Fields—Field Number" on page 360 for a description of the fields which can be exported and imported)*. Alexandria automatically creates a file header which is used by Alexandria to import an exported file without the user knowing anything about the contents of the data.

> **- HINT -**
>
> You can use the checkmark buttons at the bottom of the window to select or deselect all fields. Use the **Default** button to set a default list of fields.

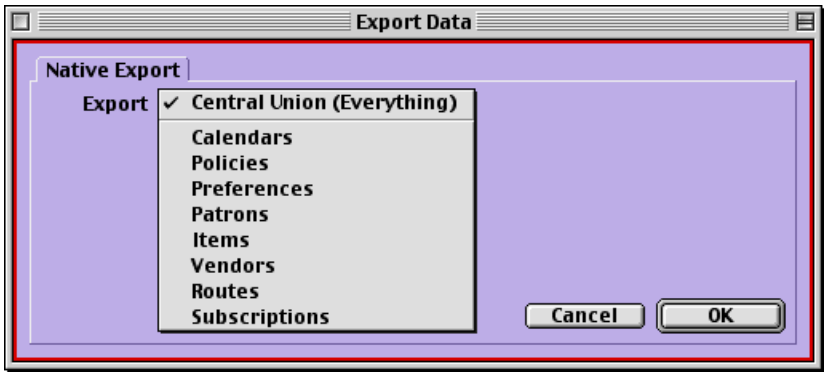
Selecting **Print** from the **File** menu will print a report of your selections.

Data can be sorted before export by selecting **Sort by** selections.

You can use the Virtual Word Processor integrated into Alexandria to view any file you've exported. To view an exported file, use **Open** from the **File** menu to select the file *(for more information on import/export formats, see "Importing Patron Information" on page 359)*.

Export Other

This utility allows the librarian to export other Alexandria data to import into another Alexandria database. When **Run** is selected, the following options are made available.

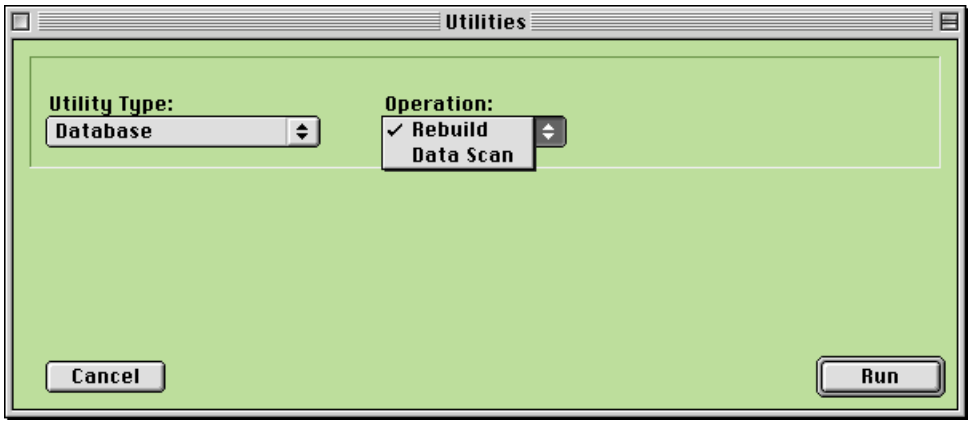


Select the data you want exported. To import it into another Alexandria database, import as you would any other import file. Alexandria will recognize the data and correctly import it.

Check for Updates

If you have an Internet connection, you can check for Alexandria updates from COMPanion's server. If an update is available, a description of the update is shown, and you can choose to update your Alexandria Data Station or wait for a future date. This Utility is only available for the Data Station; Librarian Workstations do not offer this selection.

Database Utilities



Database utilities allow you to correct problems with the record structures saved on disk. Unlike the Verify utility, these utilities don't look at individual pieces of data—only at entire records. If you've had a power outage (or other serious problems with your hardware), you may need to run this utility.

Rebuild

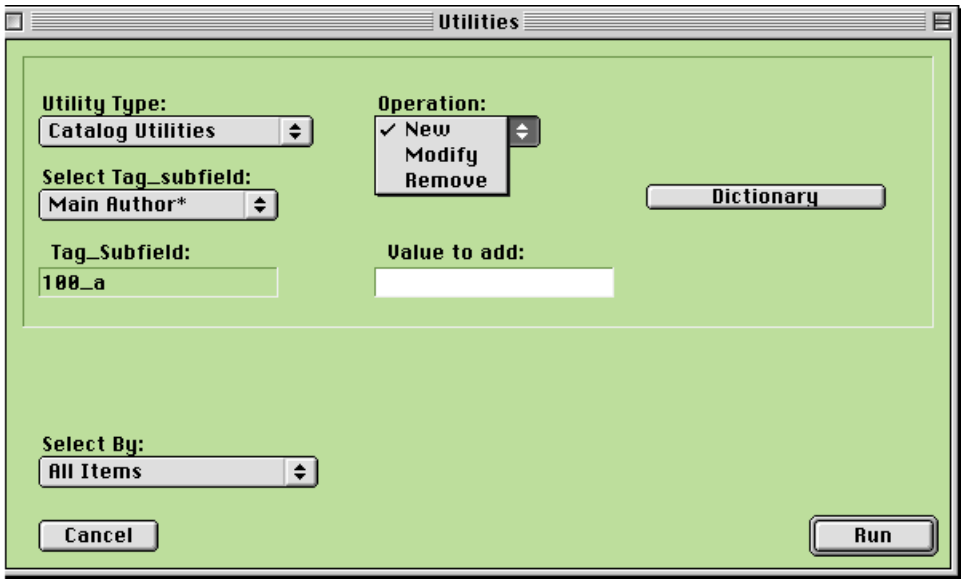
This utility rebuilds all data files and then runs all Verify routines. If data damage is detected, it's automatically fixed. If unrecoverable damage is detected, you'll be notified and will have to restore a backup before you can continue. Alexandria tries very hard to recover your data. If it can't be done, there is nothing COMPanion can further do to restore the data. Your best protection are frequent backups of your valuable data. Run this Utility once a month to keep data in good order.

Data Scan

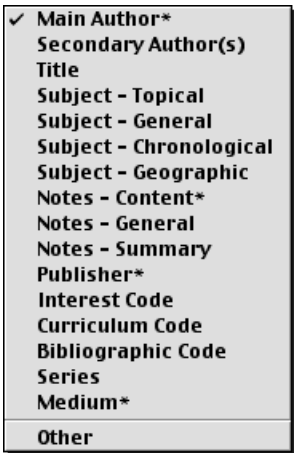
This utility reads all disk data structures, looking for errors. If no errors are detected, there is high confidence that your data is secure. If errors are found, Alexandria makes every attempt to repair the problem—which may require a full Rebuild. If you don't shut down your Data Station properly, a Data Scan will be initiated automatically when you next start Alexandria. You *can* cancel this operation, but it's not recommended unless you plan on restoring a backup.

This Utility is only available on the Data Station. Librarian Workstations do not offer this selection.

Catalog Utilities



Catalog Utilities allow the user to add **(New)**, **Modify**, or **Remove** any information in a Marc record within your collection. Only records in a selected range are examined for modification. When an asterix "*" appears next to a menu selection, it means that only one (of the selected) is allowed per item. For example, you can only have *one* **Main Author*** per title and there can be only one **Medium*** type.



WARNING!
Catalog Utilities permanently modify groups of records. If you are unsure (or just want to be safe), perform an Archive of your data before you perform this utility in the event of a huge mistake you can restore your old data. Be extra careful when you use these routines!

Since Alexandria stores data in a Marc format, making changes involves modifying data in Marc Tags and Subfields. The utility allows you to specify a specific subfield, or you may specify multiple subfields within the same Tag.

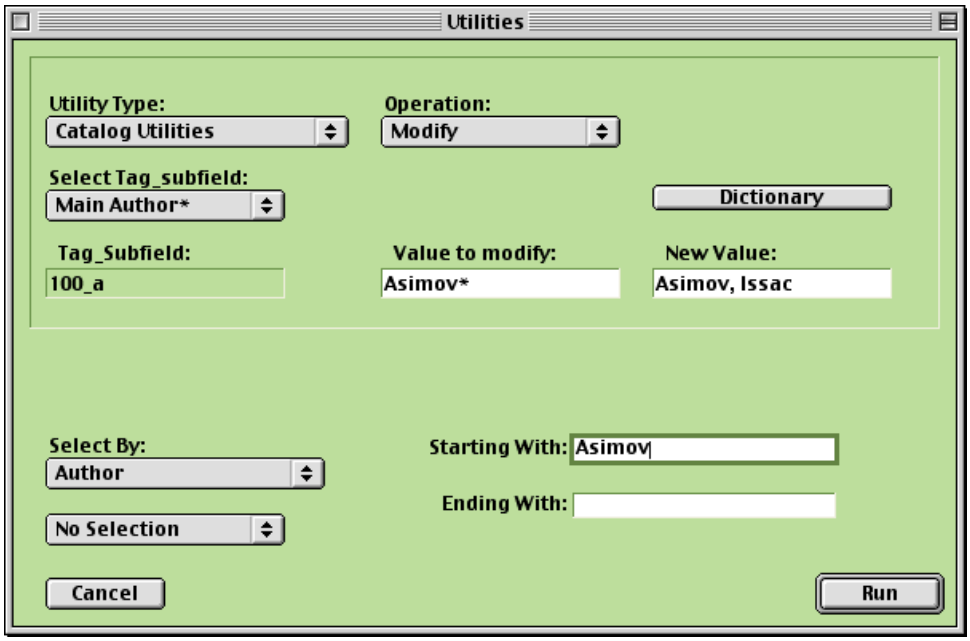
When checking for data to modify, you can specify wildcard characters for matching purposes. Use the `"*"` character to specify any number of characters, and the `"?"` character to specify a wildcard match for only one (or none) character.

If you specify **only** a Tag in the **Tag/Subfield** area, then you must specify subfields in the other fields.

Thus, to remove all subfields in the **260** tag, Enter only "`260`" in the Tag field, and in the **Value to Remove** field enter `"_a*_b*_c*"` The wildcard character, `"*"`, causes Alexandria to match all values, and since this is a remove operation, it will remove all the specified subfields. When all subfields are removed from a Tag, the Tag itself is automatically removed. Use `"_?"` to specify "any subfield."

Thus, to look for all Author listings that begin with Asimov, enter `"Asimov*"` as we do in the following example:

In this example, the user wants all author entries for Isaac Asimov to have the same format.



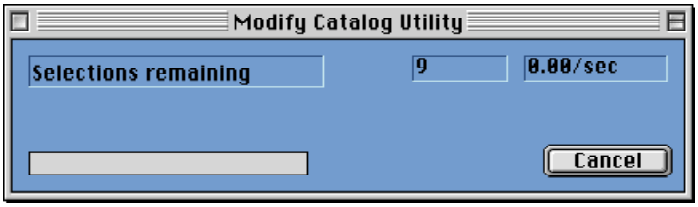
Step 1. We set the selection to only examine records where the author is Asimov.[1]

Step 2. Specify that we want to modify only data in **100_a**.

Step 3. Just to be sure, we check to see that the Author begins with `"Asimov"`.

Step 4. We replace matching **100_a**'s with `"Asimov, Isaac"`.

Step 5. Click **OK** to start changing your data.

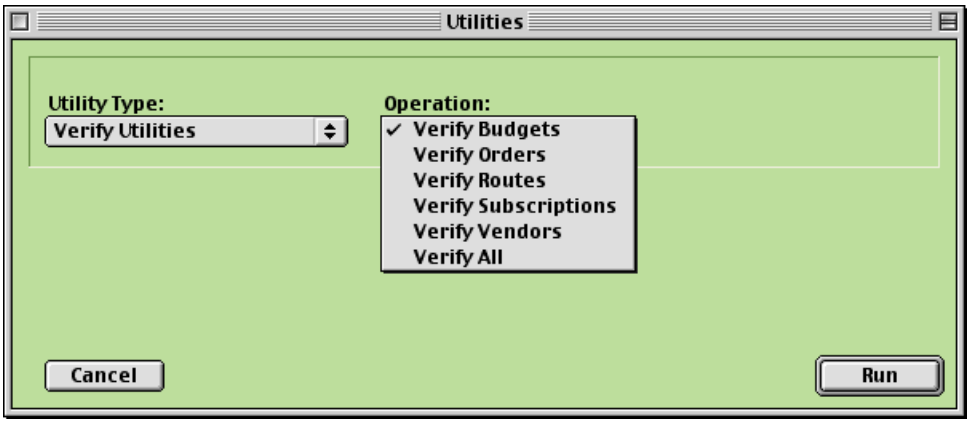


Click **Cancel** to stop the utility.

W A R N I N G !
Changes already performed will not be undone! Only unprocessed records are cancelled. Any record which was modified by the utility will stay modified.

1. In this example, the utility would also change Janet Asimov's entries to Isaac. We should have specifically selected the Author as `"Isaac Asimov"`. Use this utility with great care!

Verify Utilities



Misc Utilities are used to verify data within Alexandria files. Verifying data determines that internal relationships are valid and logical. When bad relationships are identified, they are corrected. Verification does not rebuild database structures or indexes.

Verify Budgets—Examines all Budgets, making sure they are computed correctly and that all statistics are valid.

Verify Orders—Examines all Orders for accuracy. The system confirms that all related data exists in your system.

Verify Routes—Examines all Routes, confirming that the Responsible Patron exists and that Patrons in the route lists exist in your system.

Verify Subscriptions—Examines all Subscriptions, confirming that related data exists and that internal information is logically consistent.

Verify Vendors—Examines all Vendors, making sure that Vendor statistics are accurate and logical.

Use the **Verify All** selection to verify that all data files (including Patrons, Items and Circulation), with one command.

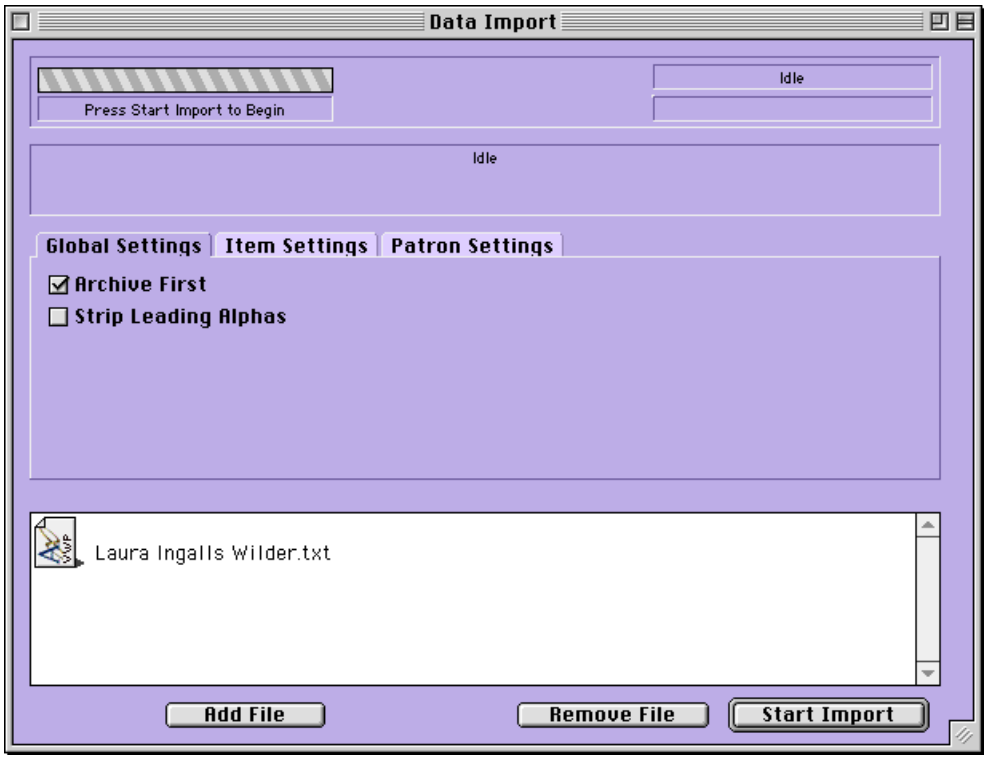
Data Import

There are times when you'll want to add information into Alexandria from other sources, such as Marc records from a book purchase or Patron information from a central database. The process of adding information into Alexandria from other sources is called Importing.

Alexandria supports importing of Patron, Item, and Transaction Command information.

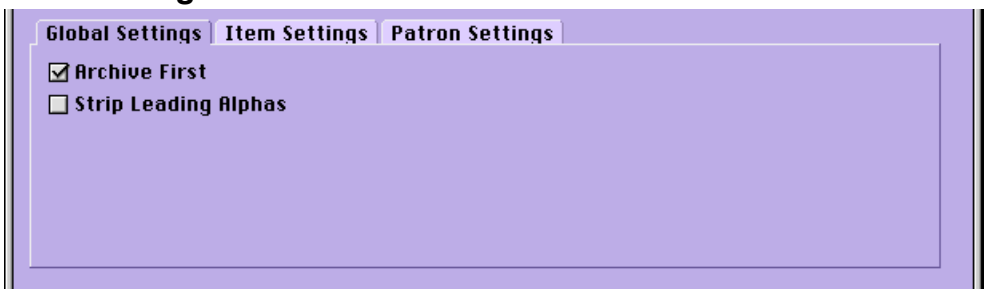
Data Import Dialog

There are two ways of importing patron or item data into Alexandria. The first is to select **Import** from the **File** menu. The second way is to drag the import file onto the Circulation window. When importing patrons or items, you'll see the following window appear.



The same window is shown for special format, tab-delimited, Marc and MicroLIF imports. With this dialog, you can set the following import preferences.

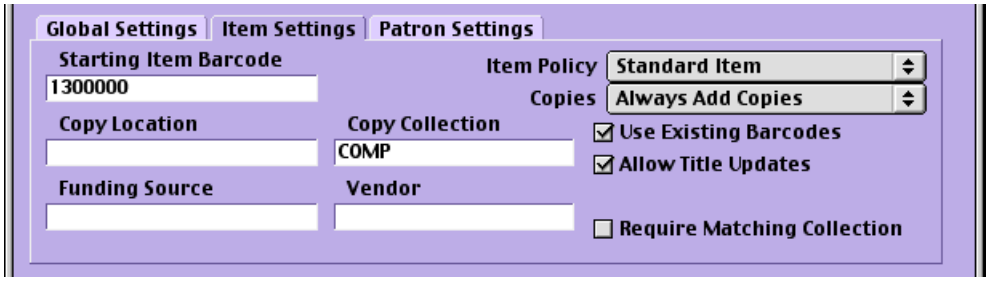
Global Settings



Archive First—When this option is selected, Alexandria will **Archive** your data before the import is performed. This is useful when bad data is imported and it's necessary to go back to a previous database. Default is **ON**.

Strip Leading Alphas—When this option is selected, leading alpha characters on imported barcode are ignored. For example, "XYZ100" would be turned to"100" if this option is **ON**. Default is **OFF**.

Item Settings



Starting Item Barcode—If a new Item Barcode number is required, Alexandria will begin assigning numbers beginning with this value. Alexandria always checks to see if a value is already in use, and if it is, a new number is automatically selected. Default is 1300000.

Item Policy—If an imported item doesn't have an item policy defined in the record, this policy will be used. Default is **Standard Item**.

Copies—Specifies how copies are managed on import. Default is **Always Add Copies**.

Always Add Copies—Whether a new title is created or a match is made against an existing title, we ensure that title has (at least) one copy. This could come from the imported record or a default copy added if the imported record has none.

Never Add Copies—Copies in imported records are essentially ignored. Only the title information is imported.

Add Found Copies—If you're updating titles and a match is made, add or update the copy as appropriate. If not updating titles, simply add a new title for every imported record and add any copies that were included in the import record (no matching; barcode collisions are reassigned).

Copy Location—If the Copy Location of the imported record isn't specified, your location value will be put into 852_b. Default is blank.

Copy Collection—If the Copy Collection for the imported record isn't specified, your collection value will be put into 852_a. Default is Library ID.

Funding Source—If the copy funding code for the imported item record isn't specified, your funding code will be put into the record. Default is blank.

Use Existing Barcodes—When this option is selected, barcode numbers found in imported records are used *as is* during import. When this option is not selected, all item Barcodes are reassigned using your next available barcode number. Default is ON.

If you know for sure that your Vendor assigned "dummy" barcode numbers with your Marc records, you'll want to turn this option off to force Alexandria to assign new barcode numbers according to your system preferences.

Allow Title Updates—When this option is selected, imported data is used to can update existing Titles if key fields match. When this option is not selected, only new records are added. Default is ON.

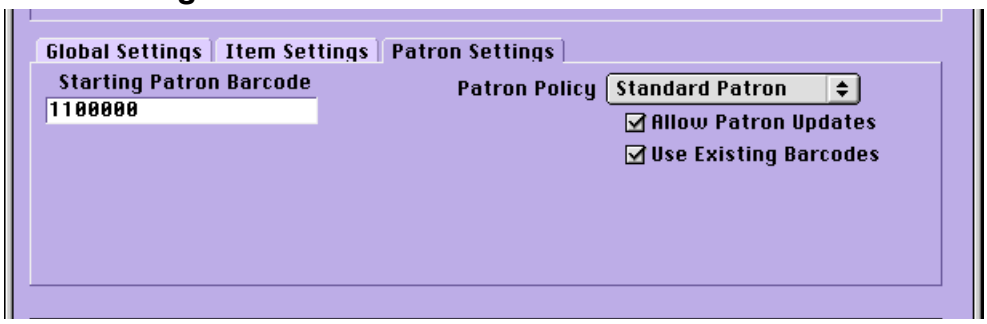
Typically, you'll want Alexandria to add new copies to existing titles, or use the import function to update brief records. If however, you want Alexandria to create new Title records for each Marc record imported, turn this option OFF.

ON—If title or copy data is matched, the existing title record is modified whether that means adding copies or updating copy and title info.

OFF—Existing titles are never modified by import. If a barcode matches, it is reassigned. Title records are added—copies may or may not be added.

Require Matching Collection—When ON, copy data is ignored for copy tags where the **852_a** collection code doesn't match the current collection code as specified on the Library Information Preferences window *(see "Library ID Code" on page 87)*. When there is no **852_a** information, it is assumed to be the local collection code. When **OFF**, all copies are imported—no matter what the **852_a** tag contains. Default setting is **OFF**.

Patron Settings



Starting Patron Barcode—If a new Patron Barcode number is required, Alexandria will begin assigning numbers beginning with this value. Alexandria always checks to see if a value is already in use, and if it is, a new number is automatically selected. Default is "1100000".

Patron Policy—If an imported patron doesn't have a policy defined in the import file, this policy will be used. Default is **Standard Patron**.

Allow Patron Updates—When this option is selected, imported data is used to update existing Patrons if key fields match. When this option is not selected, only new records are added. Default is **ON**.

Use Existing Barcodes—When this option is selected, barcode numbers found in imported records are used *as is* during import. When this option is not selected, all barcodes are reassigned using your next available barcode number. Default is **ON**.

To view the file before it's imported, highlight it and click on the **View File** button. To add additional files for import, drag them into the **File Import List** field, onto the Alexandria program icon, or onto the Transaction window.

Click **Start Import** to begin the import. Use **Cancel** to end the import. Use **Pause** to halt import temporarily. During import, status is shown at the top of this window.

W A R N I N G !

Importing Statistical Information

Be careful when importing statistical information. The numbers you import (such as copies available or January Usage) will replace the current Alexandria library statistics and could result in loss of information. For example, if the program calculates 25 as the January usage, and you import the number 12, the system will now show 12 although 25 is correct.

Computerized Records

Before we go further, it will help to understand some basic concepts about computerized records. In order to exchange information between different programs (or even between different computer systems), one needs to get the information into a format that many different programs can understand. The standard, called ASCII[1], is widely used to exchange information between different programs and computer systems. Sometimes an ASCII file is called a text file (**"*.txt"**) because all it contains is textual information.

ASCII files contain two types of characters: standard visible characters such as numbers and letters of the alphabet, and special characters that are called Control Characters.[2] Control Characters are used for special purposes to control the display or interpret the information in the file. If you have computerized data, you may be familiar with the `<tab>` and `<return>` control characters that are used to make text more legible. Because we can't print these characters, they are represented as <tab> and <return> in the manual.

When dealing with computerized information systems, you often hear the terms **field**, **record**, and **file**. A **field** is the smallest unit of information stored. An example of a field is a book's title. A **record** is a related group of fields. Many records of the same type saved together are called a **file**. For example, in a **file** of names, a **record** consists of the **fields** "`First Name`" and "`Last Name`". A more complex file may include records with other fields such as "`Phone Number`" and "`Address`".

1. American Standard Code for Information Interchange (ASCII)
2. Since you can't see the **TAB** or **RETURN** characters, they are represented in this document as `<tab>` and `<return>`.

In other words, **records** contain **fields** filled with information, and **files** contain many **records**.

In the library world, there is a fairly well-defined method of exchanging bibliographic information between computers. This format is called **Marc**, for **MA**chine-**R**eadable **C**ataloging. Another format of the Marc is called **MicroLIF,** for **Micro**computer **L**ibrary **I**nformation **F**ormat. Alexandria has been programmed to recognize both Marc and MicroLIF files automatically during import, and can export in both formats.

In addition to importing and exporting Marc and MicroLIF records, Alexandria is capable of importing and exporting files in a **tab-delimited** format. This format can be used to exchange information with other programs that utilize more complex Marc standards. Most database, spreadsheet, and word processing programs on personal computers support files in a tab-delimited format.

Tab-Delimited Records

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
Bill <tab> Jones <return>
My First Name <tab> My Last Name <return>
```

Using a tab-delimited patron import file, you can transfer information about patrons stored in another computer system. For example, a school can use this capability to transfer student information from the school administration computer system into Alexandria, or to transfer library information back to the administration system.

Alexandria's Tab-Delimited Import File Format

In Alexandria, we've enhanced the tab-delimited format by adding special information on the first line of the file, used to interpret the data in the file. This first line is called a header because it's at the head (or beginning) of the file. The header allows programs to figure out where the data in the file belongs. Alexandria headers look like this:

###*FileCode/FieldCode/FieldCode/FieldCode/ <return>

The ###* doesn't mean anything, but is a rather unusual character combination, and is unlikely to be found at the beginning of a file. If Alexandria finds a file with ###* at the beginning, it assumes that the file is in a familiar format.

The header is optional. If it's present, Alexandria will automatically place the information where it belongs in the specified fields. The field codes must be in the same order as the data. If there is no header, Alexandria displays a window allowing you to specify the order and type of data getting imported. A header is automatically created for all export files.

> **- NOTE -**
>
> The field code numbers used for field codes don't have any special meaning other than acting as unique identifiers for each of the fields that can be imported or exported.

Since the header is automatically created on export, the information can be transferred to another copy of Alexandria and automatically imported without the user knowing anything about the structure of the file. This makes it easy for central administrators to transfer information to Alexandria users. In order to be consistent, Alexandria assumes that the first line of any import file is a header. However, it only knows how to process headers in the format stated above.

Some fields allow multiple lines of information (such as abstract or patron notes). Any <return> located in a field is converted into the '\' character on export and on import, the '\' character is restored to a <return>. Generally, you don't need to know about this. However, if you were to examine an exported file, you'd see these characters. Also, if you wanted to add a <return> into a file that is getting imported, you can use the '\' character to make it happen.

Import File Example

A sample patron import or export file might look like this:

###*PT01/1000/1007/1006/ <return>

1100000 <tab> Bill <tab> Smith <return>

1100001 <tab> John <tab> Jones <return>

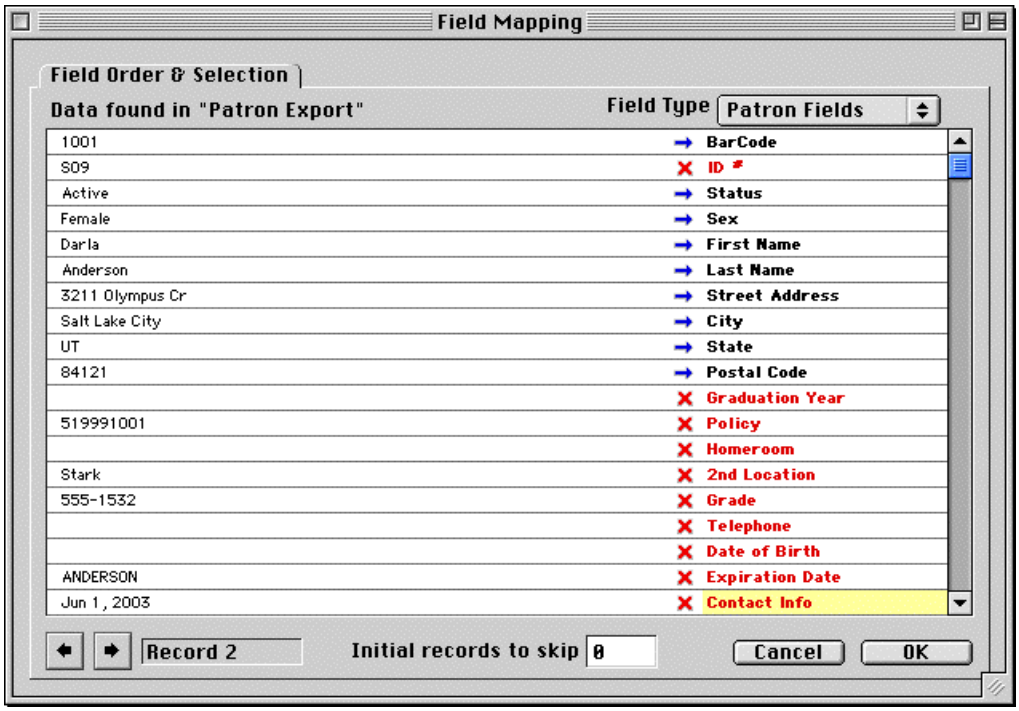
In the example above, the header field codes "1000, 1007, 1006" specify that the fields are ordered by barcode, first name, last name. An item record will be in a similar format, except that different field codes are used and different types of field information is entered (i.e. title or author of the item).

A simple way to study these formats is to export a few records, then examine the export file with Alexandria's virtual word processor.

If you export from Microsoft Works, you'll notice that Works also places a header at the beginning of its files. The header contains the titles of the columns in the file you've exported. If you want, you can open this export file with the word processor in Works and replace the Works header with a valid Alexandria header. If you don't do this, you'll have to make sure that you selected the correct fields on the Field Mapping window in Alexandria.

Field Mapping Window

When there is no header on a tab-delimited file, the Field Mapping window appears so that the user can specify which data in the import file goes into which Alexandria fields. In this example, the user has adjusted the order of the fields to match their import file.



Use the **Field Type** pull-down menu to specify **Patron** or **Item** fields. The data from the import file is shown on the left of the window. Alexandria field names are shown on the right side.

Use the arrows on the bottom left of the window to examine different records in the import file. If you want to skip some of the records in the import file, you can specify an **Initial records to skip** value—default is zero.

To adjust the order of the Alexandria fields, click and drag the field names. Put the Alexandria field names in the correct order for your imported data. To skip a field, double-click on its line and the arrow will change to a red X. This means the data for this field is ignored and will NOT be imported.

Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop importing.

Importing Patron Information

Importing is the process of moving information into Alexandria from another source. This is usually a quicker and easier method to get information into Alexandria than entering it manually.

Using Alexandria's import function, you can move patron information from other computer applications directly into Alexandria. For example, you might be able to get patron information from the administrative office student database and import it into Alexandria. When students graduate from elementary to middle school, you can provide patron records that the middle school can import into its Alexandria system.

Alexandria can import patron information files in tab-delimited format. Most word processing and spreadsheet applications support files in tab-delimited format.

Rules for Importing Patron Information

When importing patron records, Alexandria first checks if barcode numbers and ID numbers are being imported. If they are, Alexandria makes sure these numbers are unique and not already in use by another patron.

- Alexandria looks for a header that contains a file designation of "PT01[1]" to specify Patron information.
  ###*PT01/fieldcode/fieldcode.../ <return>

- During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing record is located (and **Allow Patron Updates** is selected), the existing Alexandria record is updated with the imported information. If **Allow Patron Updates** is OFF, the matching import records are ignored. If no records in the system match, a new record is added.

- In looking for matching records, Alexandria first checks the Patron Barcode, then the Community ID, and Government ID. If no matches exist, the import record is considered a new record. New records are assigned barcodes and policies based on the preferences you've entered in the Import window.

- Alexandria v5 supports Alexandria v3 patron headers for compatibility with older data transfer systems.

Uses for Patron Import and Export

The patron import/export routine allows the library to share patron information with other computer systems. A city library can get a list of residents from the local utility company, or a school library can get a list of patrons from the school administration system. Thus, library patron information can be transferred to other programs. For example, a school may hold a final report card if the student owes fines to the library. By giving fine information to the school administration program, others may benefit from this library information.

Another use for export/import is to modify information in a group of records. Patron information can be exported, opened in another computer program, modified, then returned to Alexandria. Sometimes this is much easier than modifying records (one at a time) in Alexandria.

1. The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero and is not an "O".

Patron Fields—Field Number

Barcode—1000
Community ID Code—1001
Government ID Code—1002
Password—1003
Location—1004
Secondary Location—1005
Last Name—1006
First Name—1007
Middle Initial—1008
Name Index—1009 {export value only}
Level—1010
Address—1011
City—1012
State or Province—1013
Postal Code—1014
Country—1016
Phone Number—1017
Fax Number—1018
Email—1019
Contact Notes—1020
Librarian Notes—1021
Alert Notes—1022
Categories—1025 {separate category terms with \}
Status—1026 {1=Active, 2=Card Lost, 3=Usage Blocked, 4=Transferred, 5=Inactive, 6=Other}
Library Code—1027 {for multi collection databases}
Policy—1028 {Use policy short code}
Previous Policy—1029 {Use policy short code}
Current Fine Balance—1030 {export only}
Fine Payments—1031 {export only}
Sex—1032 {Unknown=0 or U, Male=1 or M, Female=2 or F}
Life to Date Usage Count—1033 {export only}
Number of items currently checked out—1034 {export only}
Life to date overdue count—1035 {export only}
Number of items currently overdue—1036 {export only}
Number of items currently on hold—1037 {export only}
Current Reservations count—1038 {export only}
In-stock Holds count—1039 {export only}
Reserves Count—1040 {export only}
Keep Patron History—1041 {Yes or No}
Last Use Date—1042 {export only}
Last Validation Date—1043 {export only}
Next Validation Date—1044 {export only}
Date of Birth—1045
Patron Accession Date—1046
Card Expiration Date—1047
Graduation Date—1048
Patron RSN—1099 {export only}

Importing Item Information

Importing is the process of moving information into Alexandria from another source. This is usually a quicker and easier method to get information into Alexandria than entering it manually.

Using Alexandria's import function, you can move item information from other computer applications directly into Alexandria. For example, you might receive item information from Vendors and import it into Alexandria. If you move library items from one library to another, you can provide an item record that the new location can import into its Alexandria system.

Alexandria can import item information in industry-standard Marc or MicroLIF format, and also in tab-delimited format. Most word processing or spreadsheet applications support files in tab-delimited format.

Rules for Importing Item Information

When importing item records, Alexandria first determines if the item is a new record or an existing record that needs updating.

- Alexandria looks for a header that contains a file designation of "`FT01`[1]" to specify Item information.
  ###*FT01/fieldcode/fieldcode.../ <return>
- During import, Alexandria attempts to locate an existing record matching the newly imported record. If an existing record is located (and **Allow Title Updates** is selected), the existing Alexandria is updated with the imported information. If **Allow Title Updates** is **OFF**, matching imported records are ignored. If no records in the system match, a new record is added.
- In looking for matching records, Alexandria first checks the Copy Barcode, then the ISBN, and LCCN. If Alexandria finds an EXACT match for the Barcode, ISBN, or LCCN, then the matching record is updated. If the previous check fails, Alexandria then checks for matching Title, Author, Medium, Call Number. Publication Year, Publisher, Extent and Volume—if a matching record is located, it's updated.
- For updated records, if the imported record is MicroLIF or Marc and doesn't contain copy information, a new copy is added to the updated record if **Always Add Copies** is selected for **Item Import Settings**.

Alexandria performs an analysis on each and every Marc record imported so that information is correctly imported from a wide number of Vendors. If you find records that don't import correctly, send them to COMPanion and we'll update Alexandria to properly import them.

Alexandria correctly imports records from the following sources—
1987 MicroLIF
1991 MicroLIF
US Marc Communication & Marc 21
SunLink, WisCAT
Laser Cat
Dynix, Follett
Canadian Marc
...and many others since the printing of this document.

1. The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero and is not an "O".

Item fields—Field Numbers

Copy Barcode—2000 {852_p}
Copy Last Date Used—2001 {export only}
Copy checked out Count—2002 {export only}
Copy Days in Circulation—2003 {export only}
Copy Last Modified Date—2004 {export only}
Prior Patron Barcode—2005 {export only}
Previous Prior Barcode—2006 {export only}
Before Previous Prior Barcode—2007 {export only}
Inventory Date—2008 {852_1}
Accession Date—2009 {852_1}
Vendor Code—2016 {852_1}
Copy Condition—2017 {852_1}
Copy Number—2021 {852_t}
Replacement Cost—2011
Purchase Cost—2012 {852_9}
Current Policy short code—2013
Previous Policy short code—2014 {export only}
Copy Status—2015 {export only}
Copy Notes—2018 {852_x}
Copy Alert—2019 {852_z}
Funding Source—2022
Copy Collection—2023 {852_a}
Copy Location—2024 {852_b}
Copy Call Number—2025 {852_h}
Copy Volume—2026 {852_v}

LCCN—2010 {010_a}
ISBN—2020 {020_a}
Primary Author—2100 {from 100_a}
Full Title—2240 {Title: Subtitle—export only}
Title—2245 {245_a}
Subtitle—2246 {245_b}
Statement of Responsibility—2247 {245_c}
Medium—2248 {245_h}
Edition Statement—2250 {250_a}
Publication Place—2260 {260_a}
Publisher—2261 {260_b}
Publication Year—2262 {260_c}
Extent— 2300 {full description—export only}
Physical Description—2301 {300_a}
Other Physical Details—2302 {300_b}
Dimensions—2303 {300_c}
Accompanying Material—2304 {300_e}
Series Statement—2440 {440_a}
General Note—2500 {500_a}
Summary—2520 {520_a}
Target Audience Note—2521 {521_a}
Review Source—2522 {521_b}
First Subject—2651 {650_a--650_x--650_y--650_z}
Second Subject—2652 {650_a--650_x--650_y--650_z}
Third Subject—2653 {650_a--650_x--650_y--650_z}
Fourth Subject—2654 {650_a--650_x--650_y--650_z}
Fifth Subject—2655 {650_a--650_x--650_y--650_z}
Bibliographic Codes—2040 {separated by \}
Curriculum codes—2041 {separate by \}
Don't Show in Alexandria Researcher—2042 {yes or no}
Copy Count—2043 {export only}
Available for check out—2044 {export only}
Title Life-to-Date usage Count—2045 {export only}
SmartMARC Matching Score—2046 {export only}

Title Accession Date—2047 {export only}
First Used Date—2048 {export only}
Last Used Date—2049 {export only}
Last Modified Date—2050 {export only}
Last Modified User ID—2051 {export only}
Study Program Name—2750
Study Program Interest—Code 271
Study Program Reading Level—2752
Study Program Point Count—2753
Study Program Test Number—2754
Study Program Holding Code—2755
Last Validation Date—2054 {export only}
Title RSN—2099 {export only}

Importing Transaction Files

Transaction Files are used to enter transactions using text files rather than typing them in manually. Portable barcode readers create Transaction Files for import into Alexandria. Transaction files can be imported by dropping them on the circulation log if they have a recognized header; or the user can use the Read Transaction file transaction command *((see "Read Transaction file" on page 193)).*

To automatically recognize a Transaction File, Alexandria looks for these headers:

Palm Laser scanner—Header begins with: ### SmartScan...

Heavy Duty Light pen—Header begins with: ### VidexDownload...

Heavy Duty (Rugged) Laser Scanner—Header begins with: ###VIDEX-LL...

When Alexandria is asked to import files with these headers, it will think it's a Transaction File and start processing the contents as transactions.

Marc/MicroLIF Records

Alexandria can read and write Marc or MicroLIF records. Alexandria will automatically recognize which type of record you are reading. Therefore, you don't have to worry about the format of the bibliographic data you receive.

What Are Marc & MicroLIF Records?

Marc (Machine-readable catalogue) records are designed for computers to communicate with each other. For the casual users, these records are difficult to read. Even if you have the proper training, they can be hard to decipher. Most users/patrons of your library won't know what a Marc record is, let alone know how to read one. Alexandria takes the information in the Marc record and converts it for "human" usage within the program. Alexandria can save a copy of the Marc record for transfer to other computer users. The format that Alexandria displays is called MicroLIF.

MicroLIF (Microcomputer Library Information Format) records can contain the same information as Marc records, but they are much easier for you to read. There are some examples of this at the end of this chapter.

Saving Marc/MicroLIF Records

Although the Marc/MicroLIF formats are industry standards, the type and location of some information located within the Marc record varies from Vendor to Vendor. In order to be compatible with as many different Vendors as possible, Alexandria automatically analyzes the Marc record in order to extract the information required for your library.

Conversion Rules

During Import, Alexandria takes an entire Marc record into memory and then searches for matching information to use with Alexandria. Some Vendors place information for multiple copies of an item within the same Marc record. Alexandria will locate the information pertinent for each copy, as long as the information is in a format that Alexandria recognizes.

During import, Alexandria will automatically match existing items with new items. First, if a barcode matches, Alexandria replaces old title and copy information. Second, if the ISBN and title match, Alexandria replaces the old title with the new information. Third, if the LCCN and title match, Alexandria replaces the old title with the new information. Fourth, if all previous options fail, Alexandria matches a title, author, publisher, publication, date, medium, extent, and edition. When a match is detected, information in the imported record is used to update the existing record. The assumption is that newer records contain more accurate information.

Note that if you import new information, then any information you may have modified in existing records is lost. For example, let us say you have a title and you add some title notes of your own. Then, you get a Marc record for that title and import it. If that Marc record includes a series statement, then that series statement will replace the one you have entered. As with *all* imported data, blank data NEVER replaces existing data, therefore, if the imported record had no series statement, your data would not be disturbed.

If the input file contains records that do not conform to the published standards for that format, the record will be skipped. Alexandria utilizes a superb system that attempts to decode incoming records, even when they don't conform to the published standards. If

you find records that don't work with Alexandria, please send copies of them to COMPanion and we will update our engine to correctly interpret the non-standard records.

Conversion Help

If you have any problems with your data, send COMPanion a diskette with your sample Marc or MicroLIF data, a note with the nature of your problem, and the source of the records. We will work with the supplier of your data to ensure compatibility with Alexandria and report our findings to you directly.

A Short Cut

If your import files are named something similar to: Marc001, Marc002, Marc003 (i.e. they end in three digits), then Alexandria will automatically continue reading additional files. That is, once Marc001 is read, Alexandria will continue with Marc002 and so on. This trick works for Marc, MicroLIF and Custom import formats. Using this trick, you can read up to 100 files with one import command.

Marc/MicroLIF Record Definition

For Marc records created by Alexandria

When you type bibliographic information into Alexandria, it automatically creates a Marc record based upon the information you enter.

A Marc header is created.

The LCCN is placed into Subfield 010_a

The ISBN is placed into Subfield 020_a

The word "Alexandria" is placed into 040_u to identify this as a record exported from Alexandria. The version of Alexandria is placed in 040_v. This coding allows Alexandria to correctly recognize Alexandria proprietary Marc extensions without interfering with non-Alexandria systems.

The Author is placed into Subfield 100_a

The Title is placed into Subfield 245_a, Subtitle in 245_b, Statement of Responsibility in 245_c and the Medium in 245_h.

The Edition is placed into Subfield 250_a

The Place is placed into Subfield 260_a

The Publisher is placed into Subfield 260_b

The Publication Year is placed into Subfield 260_c

The Extent is placed into Subfield 300_a—if AACR2 punctuation is used, it's parsed into the correct Tag 300 subfields.

The Series is placed into Subfield 440_a

The Content Notes are placed into Subfield 505_a

The Summary is placed into Subfield 520_a

The Title Call Number is placed into Subfield 900_a

The Volume is placed into Subfield 092_v.

Bibliographic Codes are not exported.

Curriculum Codes are not exported.

Interest Codes are placed into 521_a.

Alexandria Statistics are currently not included in the Marc export.

Only URL Attachments are currently included in the Marc exported (856_u).

If a Title has copies, Alexandria will create a Marc standard 852 tag for each copy.

The Library ID code is placed into Subfield 852_a (*see "Library ID Code" on page 84*).

The Copy Location is placed into Subfield 852_b.

The Copy Call Number is placed into Subfield 852_h.

The Copy Barcode Number is placed into Subfield 852_p.

The Copy Condition is placed into Subfield 852_q.

The Copy Alert Note is placed into Subfield 852_x.

The Copy Number is placed into Subfield 852_t.

The Copy Volume is placed into Subfield 852_v.

The Copy Note is placed into Subfield 852_z.

The Copy Cost is placed into Subfield 852_9.

Propriety Copy Information for which a Marc tag has not been assigned by the US Marc Corporation is stored in the 852_1. This tag requires special formatting. For example:

The Copy Funding Source is placed into Subfield 852_1 Funds: (`funds`).

The Copy Accession Date is placed into Subfield 852_1 Accession Date: (`date`).

The Copy Inventory Date is placed into Subfield 852_1 Inventory (`inventory date`).

The Copy Policy Code is placed into Subfield 852_1 Policy: (`policy code`).

The Copy Condition Code is place into Subfield 852_1 Condition: (`condition code`).

A Sample Marc Record

Note how difficult it is to read Marc formatted records:

00826cam 2200217 a 4500008003900000010001300039020001500052040002500067050002500092082001000117100002200127245008600149260003200235300003100267520013300298650001300431650002000444650002400464852010600488900001400594-870120s1987 nyua j 00010 eng-a87000565- -a0396089259- -aCCSM5.0.3-cCCSM5.0.3- -aPZ 8.1.B755-bGo 1987- 219-aE--aBrett, Jan-d1949-- 0-aGoldilocks and the three bears-cretold and illustrated by Jan Brett-dBook-h[book]- -aNew York-bDodd, Mead-cc1987- -a[32] p.-bcol. ill.-c29 cm.- -aLost in the woods, a tired and hungry girl finds the house of the three bears where she helps herself to food and goes to sleep.- aFolklore- -aBears-xFolklore- -xJuvenile literature- -aCDL-h398.2 BRE-p3083t1-90.001Accession:02/03/2000 | Inventory:02/03/2000 | Policy:NF | Condition:Unknown | - a398.2 BRE-

A Sample MicroLIF Record

Note how much easier it is to read this MicroLIF formatted record than the equivalent Marc record:

LDR00000cam 2200000 a 4500^

008870120s1987 nyua j 00010 eng^

010 _a87000565^

020 _a0396089259^

040 _aCCSM5.0.3_cCCSM5.0.3^

050 _aPZ 8.1.B755_bGo 1987^

082 _219_aE^

100 _aBrett, Jan_d1949-^

245 0_aGoldilocks and the three bears_cretold and illustrated by Jan Brett_dBook_h[book]^

260 _aNew York_bDodd, Mead_cc1987^

300 _a[32] p._bcol. ill._c29 cm.^

520 _aLost in the woods, a tired and hungry girl finds the house of the three bears where she helps herself to food and goes to sleep.^

650 _aFolklore^

650 _aBears_xFolklore^

650 _xJuvenile literature^

852 _aCDL_h398.2 BRE_p3083_t1_90.00_1Accession:02/03/2000 | Inventory:02/03/2000 | Policy:NF | Condition:Unknown | ^

900 _a398.2 BRE^

991 _aNon Fiction^`

District Librarian

If you've purchased the **District Librarian** license, you'll benefit from some additional capabilities for your WAN-enabled Alexandria Data Stations. The District Librarian Workstation has all the features of a Single User Alexandria license PLUS the ability to access and modify any WAN-enabled Data Station in the District Address Book.

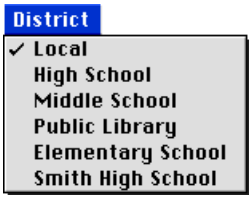
> **- NOTE -**
>
> The District Librarian capabilities are an optional feature of Alexandria. You must purchase a separate license to use this feature. Each Data Station that you want to manage must have the Alexandria WAN or you will not be able to access it with the District Librarian.

The District Librarian is installed similar to an Alexandria Data Station, with several slight differences.

- The installer is called **District Librarian Installer**.
- The program is called **Alexandria District Librarian**.
- You'll need separate District Librarian registration codes.
- The District Librarian program creates an empty data folder during startup. This data folder can be used to store local District Librarian data, however, most of the time the program will be connected to a remote Data Station as if it were a Librarian Workstation for that remote Data Station.

The District Librarian works exactly like an Alexandria Data Station, with the following differences.

- A new **District** tab appears on the Administration Preference window *((see "Configuring the District Librarian" on page 371)).*
- A new **District** menu item appears in the menu bar.



Using the District Menu

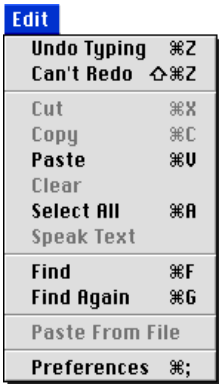
The District menu allows the user to choose which Data Station they would like to connect to. When the District Librarian is connected to a Data Station, it operates EXACTLY like a Librarian Workstation installed for that Data Station.

- NOTE -

In order to use the District menu, you must be logged into the District Librarian at the Administrator password level.

When you change Data Stations with the District Menu, you may have to identify yourself by entering a User Name and Password. Make sure you're configured as an Administrator or District Librarian on all the systems you'll be accessing.

- When the District Librarian has **Local** selected, the program works exactly like a Single User Alexandria License.
- To move between collections, go to the **District** menu and select the collection/location to connect with.
- You may be requested to give a password in order to connect to a Data Station as if you were in the actual building You must have a valid user name and password on the remote Data Station. When adding your name to the user list, be sure to select District Librarian as your level status. Use the same password in each building and the same form of your name to make logging onto the District Librarian program easier.

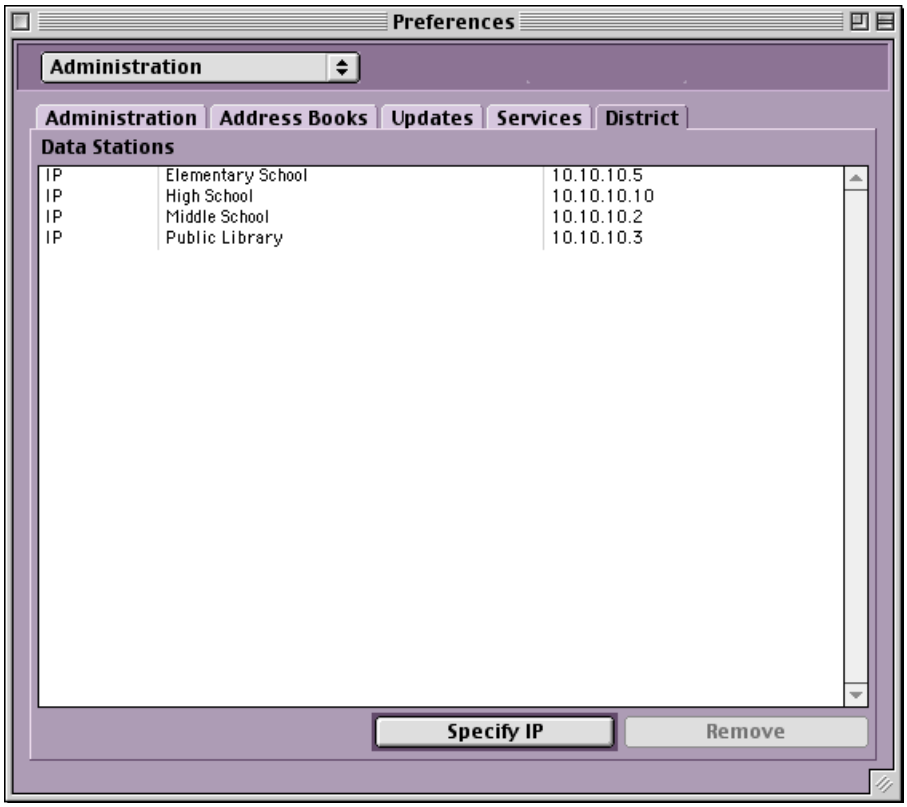


Configuring the District Librarian

Before you can use District Librarian to examine or control other library Data Stations, you'll need to configure the District Librarian using the **District** tab.

Step 1. Select **Preferences** from the **Edit** menu.

Step 2. Click on the **District** tab of the **Administration** preference window.



Step 3. For each Data Station that you want to control, add it by clicking on the **Specify IP** buttons. Enter the Data Stations IP Address and a Friendly Name. The **Friendly Name** is the name you will see in the new **District** menu; it doesn't have to match the name of the controlling library. If you're going to add several addresses, click on the **Keep window open after adding** check-box. This will keep the window open after each new

address is configured. When you are finished, click on the **Cancel** button or use the window close box.

Add IP Address
IP Address 10.10.10.15
Specify a standard internet name (e.g. library.school.edu) or a numeric internet address (e.g. 209.210.71.12).
Friendly Name Smith High School
This is the name that will appear in the Data Stations list.
Keep window open after adding.
Cancel
Add

Technical Details

Alexandria v5 contains several advanced technologies. Although it's not necessary to understand how Alexandria does what it does, this chapter is for the technical person who wants to know more about the inner workings of Alexandria.

Alexandria v5 is unique

Alexandria v5 is built on top of a proprietary cross platform (Windows and Macintosh) development system developed specifically for Alexandria. The core components of this system consist of these unique technologies:

- A prioritized multi-threaded scheduling system which schedules and manages all the executable components of the program. All processes within Alexandria are prioritized and queued automatically by our scheduler.
- A powerful communications system that supports TCP/IP communications protocols and addressing. This system can handle thousands of simultaneous messages. All messages are encrypted for communications confidentiality. Only authorized messages are processed by the system.
- An integrated Web Server provides many Researcher options via standard Web browsers across all platforms which support Web protocols.
- A powerful relational database optimized for storing and accessing library information. Saved Data is encrypted for added data security. The database is very high performance—on a high end G3 processor with a quick disk drive, it can fully catalog up to 15 Marc records per second.
- A powerful word processor which uses its own virtual memory manager to support very large documents with a small amount of physical memory. Documents can be freely moved between supported platforms.
- A "class library" for developing cross platform human interfaces.
- A proprietary toolbox of code used by all subsystems.
- Integrated debugging tools. Integrated diagnostic and debugging systems are used throughout all our tools.
- A fully distributed transaction-based client/server architecture. The server (Data Station) processes requests from all clients. Only information necessary for processing is moved between clients and the data station. This places very low demands on already overloaded wide-area networks.

How do the workstations communicate with the Data Station?

When the Data Station creates installer folders, the TCP/IP address of the Data Station is saved inside that folder. When the installer creates a workstation, this same addressing information is placed inside the workstation application. This addressing information is saved in an encrypted format which can only be read by Alexandria.

What happens if the Data Station's address changes?

If the address of the Data Station is changed—none of the workstations will be able to communicate with it and all workstations will have to be installed again. To force the Data Station to build new installers, quit the Data Station, remove the installer folders and restart the Data Station. New installers are automatically created.

Can I move my VWP (Alexandria Word Processor) documents to other word processing programs?

Yes, the VWP has a **Save As Text** option. However, you'll lose all document formatting.

Can I move my other word processing documents into Alexandria's Word Processor?

Yes, with your other word processor, use the **Save as Text** option. VWP can open TEXT documents. However, you'll lose all document formatting.

Shortcut Keys

Accelerator and Hotkey Commands

Hotkeys—Hotkeys are the underlined characters in a menu item or dialog box that allow users to access the item or control by pressing that character's key on the keyboard. In the case of dialog controls, the user may have to hold down the `<alt>` key before pressing the hotkey. Hotkeys are sometimes referred to as *shortcut* keys, *access* keys, or *mnemonic* keys.

Windows Shortcut Keys

`Ctrl+Shift+N`	New Document
`Ctrl+O`	Open
`Ctrl+W`	Close Window
`Ctrl+Alt+W`	Close All
`Ctrl+S`	Save
`Ctrl+Shift+S`	Save As Text
`Ctrl+P`	Print
`Ctrl+Shift+E`	Restart
`Ctrl+Q`	Exit Alexandria
`Ctrl+Z`	Undo
`Ctrl+Shift+Z`	Redo
`Ctrl+X`	Cut
`Ctrl+C`	Copy
`Ctrl+V`	Paste
`Ctrl+A`	Select All
`Ctrl+F`	Find
`Ctrl+G`	Find Again
`Ctrl+;`	Preferences
`Ctrl+L`	Patrons
`Ctrl+I`	Items
`Ctrl+T`	Circulation
`Ctrl+C`	Search

Accelerator keys—An accelerator key is a keyboard shortcut that is accessed by holding down modifier keys (<shift>, <ctrl>, <alt>, or combinations of these) and pressing another key on the keyboard. Accelerator shortcuts appear to the right of a menu item text.

Macintosh Shortcut Keys

⇧+⌘+N	New Document
⌘+O	Open
⌘+W	Close Window
⌥+⌘+W	Close All
⌘+S	Save
⌥+⌘+S	Save As Text
⌘+P	Print
⇧+⌘+E	Restart
⌘+Q	Exit Alexandria
⌘+Z	Undo
⇧+⌘+Z	Redo
⌘+X	Cut
⌘+C	Copy
⌘+V	Paste
⌘+A	Select All
⌘+F	Find
⌘+G	Find Again
⌘+;	Preferences
⌘+L	Patrons
⌘+I	Items
⌘+T	Circulation
⌘+K	Search

Glossary

Alexandria Data Station—The Alexandria program that performs the processing on and permits the access to the data. Includes the ability to circulate, import, export, manage patrons, manage items (catalog), search, run reports, and perform certain maintenance functions. (This is the server program and doesn't necessarily require server hardware.)

Alexandria Librarian—The Alexandria program for additional circulation and cataloging stations. Includes the ability to circulate, import, export, manage patrons, manage items (catalog), search, and run reports. Only some maintenance and database related functions are available on this program whereas all maintenance and database related functions are available on the Data Station. (This is a client program and doesn't actually have direct access to the data. Makes processing requests of the Alexandria Data Station.)

Alexandria Researcher—The Alexandria program for patron OPACs (on-line public access catalog) or Search Catalogs. (This is a client program and doesn't actually have direct access to the data. Makes processing requests of the Alexandria Data Station.)

ASCII—American Standard Code for Information Interchange - a universal; encoding system for text characters.

Attachments—Electronic files or documents that appear on the patron or item record where they are attached. These attachments can be accessed from the patron or item details screens from circulation, management, or search screens. Attachment descriptions for items are keyworded and searchable from Search or the Alexandria Researcher.

Bookdrop—Circulation mode for checking in books.

Boolean Logic—Named after George Boole. A logical combinatorial system treating variables, such as propositions and computer logic elements, through the operators AND, OR, NOT, and XOR. This logic can have one of two values, true or false.

Bulletin Board—A message-display center within Alexandria. Messages can be viewed from any Alexandria program but can only be added from the Data Station or Librarian programs.

CDR—Compact disc-recordable. A compact disc on which you can write only once and thereafter is read-only.

CDRW—Compact disc-re-writable. A compact disc on which you can write and real from several times.

Check in/out—Circulation mode for checking out or checking in books. Rules that apply are 1) if current patron doesn't currently have the copy checked out and the copy is available, check it out to the current patron; 2) if the current patron doesn't currently have the copy and the copy is checked out to someone else, ask the user if the copy should be checked in - if yes, then try checking it out to the current patron; or 3) if the current patron has the copy already checked out, check the book in. What this mode does, as has been shown, depends on the conditions above.

Data—Numerical or other information represented in a form suitable for processing by computer.

Details—Additional status information about the patron or item that can be accessed.

Discarded Items—A special patron (barcode 2) that will change the status of an item to discarded. When an item is damaged, weeded or discarded and must be flagged for reports or removal, just check out the item to the Discarded Items patron.

Hold—Also known as a pending hold. Use this when all copies are checked out and someone wants any copy of that item publication as soon as one is available.

HTTP—Hypertext transfer protocol. The WWW page prefix indicating the clickable "hotlink" arrangement used to instantly take you to a different page. A protocol used to request and transmit files, especially webpages and webpage components, over the Internet or other computer network.

In-Stock Hold—A hold that has been filled and is awaiting pick up by the patron indicated. Notices do not currently print automatically but can be printed from the Circulation Reports.

Inventory—Circulation mode that date stamps the copy within Alexandria with the last time that the copy was seen by the system. In addition, inventory will indicate when the copy is out of shelf order by placing "??->" next to the transaction log entry. NOTE: Alexandria will change the inventory date every time the copy is checked in or checked out since that was the last time the copy was seen by the system.

Inventory/Bookdrop—Circulation mode that performs the standard functions of inventory and will check in any copies who status is checked out, lost, archived, or discarded. If you do not want the status of the item to change, then use the Inventory mode instead.

ISBN—International Standard Book Number.

Item—Any book, video, cassette, VCR, or Electronic document or file that is cataloged in Alexandria.

LCCN—Library of Congress Card (Catalog) Number.

Links—A built-in launcher for electronic files or documents.

Lost Items—A special patron (barcode 1) that will change the status of an item to lost. When an item is lost from inventory or by a patron, just check out the item to the Lost Items patron.

MARC—Machine-readable cataloging.

Patron —A library user.

PPP—Point to point protocol. A protocol used by TCP/IP routers and PC's to send packets over dial-up and leased connections.

Pull-down Menu—A menu in a graphical user interface, whose title is normally visible but whose contents are revealed only when the user activates it, normally by pressing the mouse button while the pointer is over the title, whereupon the menu items appear below the title. The user may then select an item from the menu or click elsewhere, in wither case the menu contents are hidden again. A menu item is selected either by dragging the mouse from the menu title to the item and releasing or by clicking the title and then the item. When a pull-down menu appears in the main area od a window, as opposed to the menu bar, it may have a small, downward-pointing triangle to the right.

Sequence Number—An internal accession number for patrons, items and copies. Shown in Patron, Item and copy management as a small black number in the upper right of the screen. A unique identifier assigned to every patron, item and copy added to the system. It can be reassigned by the system but not by the user.Reservation - a transaction that pre-checks-out a specific copy for a very specific date range. Can be

used to school units where the books need to be in the library between this date and that and cannot be checked out. Only the person with the reservation can check out the copy. If the copy doesn't get checked out by the person with the reservation, it will return to an available status.

SMTP—Simple Mail Transfer Protocol.

Special Patrons—Alexandria-defined patrons that perform certain tracking tasks and functions. i.e. Lost Items, Discarded Items, On-Order Items, On Repair Items, Archived Items.

Symbology—The study or interpretation of symbols or symbolism. In the case of Alexandria, the barcode symbology studies the barcode symbols.

TCP/IP—Transmission control protocol/internet protocol. A communication between computers, used as a standard for transmitting data over networks and as the basis for standard Internet protocols.

Temporary Items—An item barcode that only exists while it is checked out. As soon as the item is checked in it is removed from the system. Temporary items are only visible in circulation reports or on the patron's record. They are not cataloged or searchable. They cannot be inventoried. Use these barcodes for items that circulate infrequently or for Inter-Library Loan. See Circulation Preferences for directions on setting up a range of barcodes for temporary items. See Circulation Basics for creating a temporary item while in check in / out mode.

TUPC—Universal product code. A number and bar code that identify an individual consumer product.

URL—Uniform Resource Locator. An internet address, usually consisting of the access protocol (http){, the domain name (www.goalexandria.com), and optionally the path to a file or resource residing on that server (trade).

WWW—World Wide Web. All of the users and resources on the internet that are using HTTP.

Windows—A list of all currently open windows or screens in the Alexandria program. A fast way to switch between a search screen, the search results, a research list, and a results list without having to close or minimize the previous screen.

Z39.50—Information Retrieval Service Definition and Protocol Specification for Library Applications, officially known as ANSI/NISO Z39.50-1992, and ANSI/NISO Z39.50-1995. This standard, used by WAIS, specifies an OSI application layer service to allow an application on one computer to query a database on another. Z39.50 is used in libraries and for searching some databases on the Internet. The US library on Congress is the official maintenance agency for Z39.50.

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